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CableVision

The news and features weekly of the cable television industry

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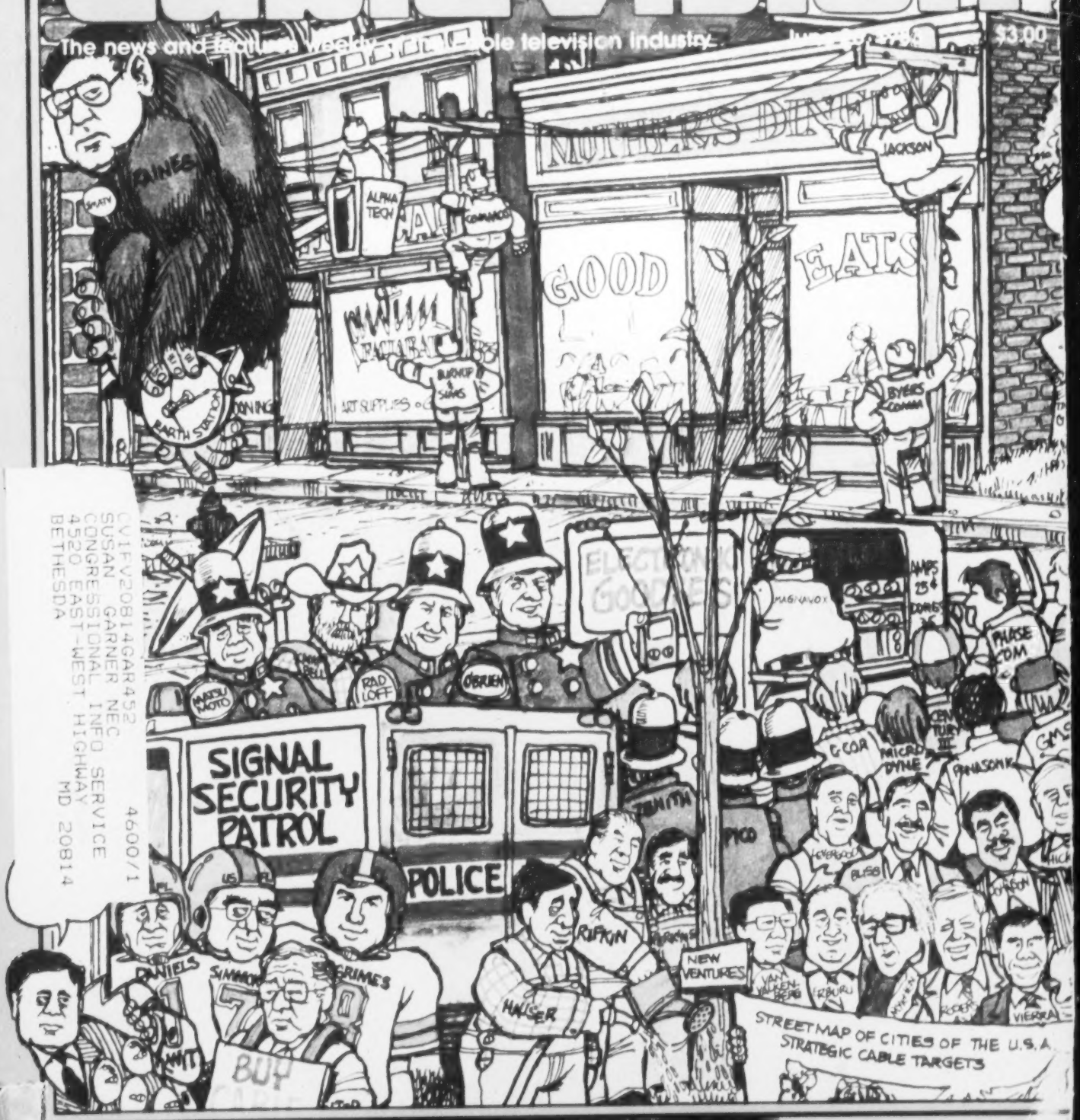

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Gearing up

Senior Editor Fred Dawson interviews several top MSO executives to find out how they are going about finding ways to ensure that capital expansion and increasing costs of operating don't trigger a red-ink washout. **Page 60.**

Teaming up for British telly

HBO, CBS, Columbia and 20th Century-Fox band together with Goldcrest Films and Television of the U.K., forming a British based company to provide programming for the developing cable TV industry in England. **Leading the week, pages 19-22.**

Business on Bravo

Rainbow Programming Services is marketing Financial News Network to prospective Bravo affiliates. Bravo also plans to expand weekend programming hours. **Leading the week, pages 19-22.**

Astrogala arrives

The cable industry descends on Houston for Cable '83, but many eyes will be on Washington watching the progress of cable bill S. 66. **Leading the week, pages 19-22.**

Microwave group convenes

The Microwave Communications Association's 1983 convention was held last week in Washington, with forums on data transmission services, MDS regulatory issues, signal piracy litigation and technical matters. **Newswire, page 15.**

The top 50

A profile of 50 top companies involved in cable. This year, the listing includes not only multiple systems operators, hardware and wire suppliers, but television broadcast networks, newspaper publishers and oil companies **Page 137.**

Astrodoings

The 1983 NCTA convention, held at the Houston Astrodome, is bound to be as ambitious as the state of Texas. In this section is a complete show agenda and booth guide. **Page 222.**

Mathias: A statesman

Maryland's senior senator discusses copyright, must-carry, Senate TV, S. 66 and the need for industry input. **Page 274.**

CableToons '83

A look at the humorous side of the cable cosmos. **Page 298.**

Dubious Distinctions

The Third Annual *CableVision* Dubious Distinctions in Cable Awards give tongue-in-cheek recognition to participants in the cable playing field. **Page 284.**

About the cover

Illustration by Rob Pudim.

QUBE 'SportsTalk' show

This week in PLUS

Houston is no place for a cable operator who is looking for retirement. In this town, the cable industry means hard work and hustle. Now that the ditch-digging and pole-climbing is done (5,000 plus miles of it) companies are getting down to fine-tuning operations. They are dreaming up ways to resell cable to appeal to the reluctant subscribers. Among the companies *CableVision* surveyed for this issue (Warner Amex; Storer; Harte-Hanks; and Centel) the top item on every agenda was signal theft. The second was sales. Warner is moving rapidly into its territorialization plan, having dropped its phone and direct mail strategies last year. Centel is forging ahead with a transition to addressability. Harte-Hanks is rebuilding and Storer is aiming a sales campaign based on better educating subscribers. Pages 167-190.

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TOP 50 companies in cable

The Top 50 companies in cable this year is an eclectic listing that includes not only multiple systems operators, hardware and wire suppliers, but also television broadcast networks, newspaper publishers, oil companies, diversified communications companies, manufacturers of satellite dishes, program producers and satellite communications companies.

The listing reflects the forces that have changed the face of the cable industry since 1978 when Time Inc. bought ATC and launched a trend toward conglomerate takeovers of independent MSOs.

In the top 50 are most of the major players in the cable game today and they are ranked in the accompanying chart according to total revenues.

In this year's list, we find only two "purely" cable companies: Tele-Communications Inc. and United Cable.

A look at earnings reports for 1982 finds most of the manufacturers suffered from drooping sales and other setbacks, while cable operating companies like ATC, Cox Cable and Storer turned in healthy gains. Some of the larger cable companies, however, like Rogers, TCI and Warner (with $46 million lost on cable operations) did not see net income increases.

Among the highlights of the events of the year 1982 of our Top 50 were the following:

- Affiliated Publications, owner of the Boston Globe and 10 radio stations, saw its cable subsidiary, McCaw Communications, add 50,000 subscribers.
- ABC, together with Group W, launched Satellite News Channel in June. It announced development of Home View Network, a pay TV service for station-to-home videotape recorder users. The first pay-per-view sports event with ESPN was kicked off and a new joint venture between ABC Video and Cox Cable, also for pay-per-view, was tested in San Diego and Santa Barbara. ABC posted record revenues of $2.66 billion.
- Burnup and Sims bought Lectro Products (manufacturers of power supplies), Consolidated Cable Corp. (cable installation) and Capscan Cable (wire manufacturer).
- Cap Cities reported its subsidiary Cablecom General (bought 1980) had its first profitable year with sales of $53 million and income of $1.7 million.
- CBS announced Nova, a joint venture with Columbia Pictures and HBO, to produce movies. Income was down slightly to $122 million on revenues of $4 billion.
- Cox Cable division of Cox Communications, with 1.3 million subs, ended its fiscal year with revenues of $514.7 million—a 39 percent increase over $188 million in 1981.
- The Jerrold division of General Instrument reported a 35 percent increase in cable revenues and acquired 51 percent of Sytek. General Instrument signed a deal with DBS provider USCI to manufacture low-cost, home earth stations.
- Oak took a beating with income down 86 percent to $4.1 million.
- Playboy Enterprises launched a new service on what was the former Escapade slot, but the company net loss was $51.7.
- It was a "severe business year," in Pioneer's words, in which the company saw its $54 million profit in 1981 slashed to a $11.5 million loss on sales of over $1 billion.
- After a year of trying, RCA gave up on its multimillion dollar pay TV venture, The Entertainment Channel.
- Scientific-Atlanta watched its sales increase 22 percent, but its income drop by 26 percent.
- Storer's cable revenues increased 67.7 percent to $22,65 million; while operating income was up 64 percent to $61.3 million. Over 300,000 new basic cable subscribes were added.
- TCI announced in 1982 it would launch its national addressable system from Denver, and did so in 1983. Earnings were down 19 percent; new acquisitions' expense was $100 million.
- Time Inc. cable revenues (ATC) were up to $864 million compared to $618 million.
- Turner Broadcasting launched CNN Headline News and added 72 national advertisers in 1982.
- Warner Amex Cable Communications suffered a $46 million loss on cable operations in 1982; but MTV was a wild success story.

Top 50 financial overview

The companies listed here are 50 of the top firms involved in the cable television industry ranked by total revenues. All dollar figures are in millions. *(Continued on page 146.)*

	Total revenues			Net income			Total assets		
Company	'82	'81	% ch.	'82	'81	% ch.	'82	'81	% ch.
General Electric	27,192.0	27,854.0	-2.4	1,817.0	1,652.0	9.9	21,615.0	20,942.0	3.2
Getty Oil Co.	12,311.6	13,251.6	-7.1	691.6	856.9	-19.3	9,924.5	9,536.4	4.1
GTE Corp.	12,066.0	11,026.0	9.0	843.0	716.0	17.7	22,294.5	20,965.0	6.3
Westinghouse	9,745.4	9,367.5	4.0	449.3	438.0	2.6	8,427.3	8,307.3	1.4
RCA Corp.	8,237.0	8,004.8	2.9	222.6	54.0	312.2	7,743.3	7,856.7	-1.4
American Express Co.	8,093.0	7,291.0	11.0	581.0	524.0	11.0	28,311.0	25,252.0	12.0
Gulf+Western Ind.	5,331.5	5,477.7	-2.7	168.6	290.9	-42.0	5,847.2	5,893.2	-1.0
CBS Inc.	4,122.8	3,955.9	4.2	112.5	162.8	-30.9	2,682.9	2,413.8	11.1
Warner Communications	3,989.9	3,237.2	23.0	257.8	226.5	14.0	3,186.4	2,673.6	19.0
Time Inc.	3,564.3	3,296.4	8.1	153.1	148.8	2.9	2,896.3	2,754.7	5.1
North American Philips	3,168.1	3,030.0	4.6	73.6	103.9	-29.2	1,825.8	1,854.1	-1.5
The Penn Central Corp.	3,165.4	3,348.8	-5.5	131.5	168.7	-22.1	3,099.0	3,394.9	-8.7
American Broadcasting Co.	2,664.5	2,443.7	9.0	160.0	146.3	9.4	1,922.3	1,588.3	21.0
Times Mirror	2,210.5	2,155.9	37.5	139.9	150.3	-6.9	2,135.6	1,917.2	11.4
MCA Inc.	1,587.6	1,328.9	19.5	176.2	89.8	96.2	1,641.1	1,367.7	19.9
Tribune Co.	1,431.3	1,406.3	1.8	23.9	89.1	-73.1	1,570.3	1,363.9	15.2
Knight-Ridder	1,327.7	897.4	7.3	102.9	100.4	2.6	1,051.3	984.7	6.7
Zenith Radio Corp.	1,239.0	1,275.0	-2.8	(21.8)	(15.6)	-39.8	682.9	743.2	-8.1
Centel Corp.	1,156.2	1,024.2	12.9	108.2	104.6	3.5	2,199.4	2,042.3	7.7
Pioneer Electronics Corp.	1,124.3	1,194.6	-5.9	(11.5)	54.2	-121.3	922.3	983.1	-6.2
Walt Disney	1,030.3	1,005.0	3.0	100.1	121.5	-18.0	2,102.8	1,610.0	30.6
General Instrument Corp.	974.3	957.1	1.8	102.2	90.0	13.5	772.2	645.4	19.6
New York Times†	933.7	841.7	10.9	54.3	49.9	8.6	761.5	598.9	27.2
Dow Jones & Co.	730.7	641.0	13.9	88.1	71.4	23.4	594.7	532.1	11.8
Capital Cities Comm.	663.6	573.8	15.6	96.3	80.6	20.0	776.0	697.6	11.2
Insilco Corp.	636.0	498.5	17.9	33.9	40.3	-15.7	566.4	517.7	9.4
M/A-COM Inc.	587.6	498.5	17.9	33.9	40.3	-15.7	566.4	517.7	9.4
Oak Industries	545.7	507.1	7.6	4.1	30.4	-86.5	636.2	609.3	4.4

Cable revenues			Operating income			Identifiable assets			Stock prices	
'82	'81	% ch.	'82	'81	% ch.	'82	'81	% ch.	'82 hi/lo	'81 hi/lo
									100/55	69⅞/51⅛
									17/13	15/13½
2,514.0	2,238.0	12.3	151.0	112.0	34.8	1,885.0	1,769.0	6.6	44⅝/26⅜	34¼/24⅜
726.2	431.0	68.5	52.3	78.1	-33.0	1,376.2	1,564.2	13.7	40½/21⅛	34½/23
									27/15¾	32¼/16¾
14.0	22.0	-36.4	(94.0)	(77.0)	-22.1	784.0	504.0	55.6	53⅛/26½	40¾/28⅛
									22⅛/14	19⅛/11½
									67/33.38	61.25/46
307.6			(46.7)			795.2			63¼/27	58⅝/33⅜
864.0	618.0	39.8	166.0	123.0	35	1,080.0	863.0	25.1	52⅜/25½	41⅜/26⅛
967.4	933.2	3.7	(13.9)	5.4	-356.9	482.9	554.3	-12.9	50⅜/30	59⅛/35¾
373.2	286.6	30.2	30.9	18.7	65.2	443.3	374.9	18.2	30½/20⅛	32⅜/21¾
14.9	12.7	17.6	(32.4)	(7.7)	-322.2	60.3	14.1	327.1	61¼/26¾	38¼/27
125.0	103.6	21.0	20.0	23.2	-14.0	394.9	287.2	37.5	68½/35½	58½/39¼
									39/19	29½/19⅜
205.9	154.1	33.7	25.5	27.1	-6.0	321.7	267.2	20.4		
									51½/27¼	41¾/26¼
80.0	34.0	135.0							16⅝/9¾	21½/10¼
26.1	17.5	49.3	2.2	1.2	88.3	106.9	79.5	34.6	37.75/27.37	35.75/23.12
									59¼/46	67⅛/41¾
409.5	301.3	35.9	121.8	82.2	48.1					
46.9	36.8	27.8	2.7	3.5	-22.7	126.1	133.8	-5.8	57¼/32⅛	38½/26½
98.7	65.7	50.2	37.4	27.4	36.5	236.5	157.2	50.4	35¼/17⅞	27⅝/14¾
53.3	21.4	148.7	1.7	(3.1)	154.2	212.4	173.4	22.5	136¼/64⅜	80½/56½
220.6	198.1	11.4	26.0	24.3	7.0	163.4	140.5	16.3	23⅜/12⅛	23⅜/14⅛
193.5	180.5	7.2	23.2	29.9	-22.5	104.7	94.3	9.9	32/11⅞	35½/20¾
315.1	260.5	20.1	2.5	53.8	-95.3	308.4	291.0	5.9	32¼/9	38½/21⅛

Affiliated Publications Inc.

135 Morrissey Blvd.
Boston, Mass. 02107
(617) 929-2000
William Taylor, chairman
John Giuggio, president

Cable interests:
- McCaw Communications Inc. (45%), 101,500 subs. McCaw purchased Southern Oregon Broadcasting Co., a cable TV systems operator, and Pacific Telatronics, a microwave common carrier, in April 1982.
- Market trial of videotex system in Miami with Knight-Ridder's Viewdata Corp.

Communication interests:
- Affiliated Broadcasting. Owns and operates 10 radio stations.
- Globe Newspaper Co. Publishes *The Boston Globe*.
- McCaw Radio Common Carrier Division. Sells and services mobile telephones.
- McCaw Cellular Communications. Applications pending in 25 major cellular radio markets.

The owner of *The Boston Globe*, 10 radio stations and the Globe Pequot Press, Affiliated Publications took its plunge into cable with the purchase of a 45 percent interest in McCaw Communications for $12 million during the summer of 1981. The 82nd-largest MSO at the time of its association with Affiliated, McCaw has since purchased Southern Oregon Broadcasting, with over 50,000 subscribers in four communities, giving McCaw over 100,000 subscribers in systems in Washington, Oregon and Alaska. Along with Southern Oregon, McCaw also purchased Pacific Telatronics, a microwave common carrier.

McCaw also is involved in developing new technology. Its cellular communications division has filed for cellular radio telephone franchises in 25 markets and its Viewtron/New England team is working on the research and development of a two-way videotex system in conjunction with Viewdata Corp. of America, a subsidiary of the Knight-Ridder Newspapers Inc. The first market trial is set to take place in Miami in late 1983, with the service being offered to the New England market in 1985 if it proves successful.

McCaw Communications was Affiliated Publications' only venture to lose money in 1982, the company's share of McCaw's losses coming out to be a little over $2.2 million. Otherwise, the company had a healthy year, with revenues up 9.9 percent, from $236 million in 1981 to $259.4 million in 1982. Profits were up 11 percent, from $14.1 million in 1981 to $15.7 million in 1982, while total assets gained 18.4 percent, from $125.6 million to $148.8 million.

American Broadcasting Co. Inc.

1330 Avenue of the Americas
New York, N.Y. 10019
(212) 887-7777
Leonard Goldenson, chairman
Frederick Pierce, president

Cable interests:
- ABC Video Enterprises. Operates several advertiser-supported cable program services as joint ventures with other companies: ARTS visual and performing arts channel (with Hearst); Daytime women's lifestyle service (with Hearst); Satellite News Channel (with Group W); RSVP Sports (with ESPN); FirsTicket movie service (with Cox Cable); and Home View Network (through ABC-owned stations).

Communication interests:
- 210 primary affiliated TV stations.
- ABC Entertainment.
- ABC News.
- ABC Sports.
- Five television stations (100 percent).
- Seven FM, six AM radio stations.
- Six ABC Radio Networks.
- ABC Publishing.
- ABC Motion Pictures.
- ABC Scenic Attractions.
- ABC Television Network.
- ABC Entertainment Center.

The first of the major networks to dive into cable, American Broadcasting, through its ABC Video Enterprises subsidiary, is exploring several new programming ideas, working closely with other companies. In collaboration with the Hearst Corp., ABC launched its "cultural" programming service, ARTS, in January 1981. Premiering with 3.5 million subscribers on 700 systems, ARTS had 8 million subscribers on 1,725 cable systems by the end of 1982. Despite the "American" in its name, ABC helps keep ARTS cost-efficient by mixing original productions with an economical dose of inexpensive material licensed from European producers. A second ABC/Hearst effort, Daytime, offers programming directed toward women. It began in March 1982 with 3.7 million subscribers on 184 cable systems, and since then has more than doubled its audience reach. In 1983, Daytime added four more hours to its schedule, now broadcasting until 9 p.m.

In other programming ventures, ABC teamed up with Group W Satellite Communications to launch an entry into the cable news field. Satellite News Channel, a 24-hour news service that intersperses local story segments between national and international news, was launched in June 1982 and now has a subscriber base of about 5.4 million. Plans for a second Satellite News Channel, which would give ABC News coverage of major stories, have been set aside for the time being.

Meanwhile, RSVP Sports, a joint venture with ABC and Getty's ESPN, offered its first program May 20 on a pay-per-view basis to approximately 2 million cable and STV homes.

Perhaps ABC's most innovative endeavor is their Home View Network, utilizing a mixture of broadcast and videocassette technology. HVN will transmit programming in scrambled form during overnight hours through ABC's five television stations. Subscribers will tape the programming on automatic videocassette machines for playback at their convenience through a Sony decoder. Homes without VCRs will be able to rent them through the service. Field tests for the service are still going on, but ABC announced its intentions to offer HVN nationwide.

Still in the early experimental stages is FirsTicket, the first fruit of a joint venture between ABC Video and Cox Cable to examine all facets of pay-per-view entertainment and information programming. FirsTicket is a 24-hour, pay-per-view movie service, and is being tested in San Diego and Santa Barbara.

American Broadcasting Companies Inc. consists of ABC Television, ABC Radio and ABC Publishing and other operations that encompass nearly every facet of communication and entertainment. ABC reported record revenues of $2.66 billion in 1982, a 9 percent increase over 1981's $2.44 billion. Net income also increased, up 9.4 percent to $160 million from 1981's $146.3 million. Cable revenues were up 17.6 percent, from $12.7 million in 1981 to $14.9 million in 1982.

American Express Co.

American Express Plaza
New York, N.Y. 10004
(212) 323-2000
James Robinson III, chairman
Robert Smith, president

Cable interests:
- Warner Amex Cable Communications. 50-50 joint venture

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with Warner Communications Inc. 1,240,500 subscribers in 147 systems.
- Warner Amex Satellite Entertainment Co. MTV; Nickelodeon; The Movie Channel; agreement with Turner Broadcasting to represent all advertising sales for Cable News Network and CNN Headline News, marketing and distribution of ARTS.
- Joint venture with Atari Inc., Compuserve Inc. and Warner to experiment in Columbus, Ohio, regarding consumer preferences in access to four major data banks; *NYT, Washington Post, LA Times*, AP.

Communication interests:
- American Express Publishing Corp. Produces two magazines: *Travel & Leisure* and *Food & Wine*.
- Mitchell Beazley Ltd. Publisher of lifestyle and travel guides.
- ADR. Direct mail service.

When American Express was looking into a cable venture during the late 1970s, it approached newly formed Warner Cable. While Warner would not sell out, the company was willing to part with half its interest in cable, and the Warner Amex Cable Communications partnership was born. Today Warner Amex is the fifth-largest MSO in the nation, and through its satellite programming division, Warner Amex Satellite Entertainment Co., it owns MTV: Music Television (8.8 million subs); Nickelodeon, a children-oriented channel with 10 million subscribers; and The Movie Channel, a 24-hour, satellite-delivered service with 2.2 million subscribers. Under a joint venture agreement—between Warner Amex, Viacom, MCA and Gulf+Western—TMC and the Showtime service will merge in a single operation, although the services will remain separate. The Movie Channel was part of a joint venture between American Express, Universal City Studios, Viacom International (owner of Showtime), Paramount Pictures and Warner Brothers.

Warner Amex's subscriber base grew to 1.2 million households in 1982, and currently extends across 147 systems in 27 states. Warner Amex has franchises in eight major cities and recently was awarded the franchise for Milwaukee, which encompasses 254,000 homes. Warner Amex's interactive cable service, QUBE, also had substantial subscriber growth in the five metropolitan areas it operates in: Houston (151,300 subs); Cincinnati (78,700); Columbus (61,000); Pittsburgh (58,000); and Dallas (43,200). Future applications of QUBE are being tested out by Warner Amex, including electronic shopping and videotex services. QUBE already has the largest cable home security service in the country, with over 5,000 subscribers, most of whom live in Columbus.

Warner Amex drew in $308 million in revenues in 1982, 3 percent of American Express' total revenues. Cable operations lost $47 million for the Warner Amex partnership, half of which was absorbed by American Express and included under their "Other Services and General Corporate Expenses" department. American Express recognizes that its cable operations, while extensive, are still in the investment stage, and it feels confident that greater profits will come later on.

The company as a whole had a good year. Total revenues were up 11 percent, from $7.29 billion in 1981 to $8.09 billion in 1982. Income was up 11 percent as well, from $524 million in 1981 to $581 million in 1982. The bulk of American Express' operations relate to financial services, including traveler's checks, credit cards, international banking, the Fireman's Fund Insurance Co. and investment services. The company's investment holdings result from the recent merger with Shearson Loeb and Rhoades, the second-largest investment security firm in the country. The new company is referred to as Shearson American Express, with Shearson's operations continuing as a subsidiary company.

Anixter Brothers Inc.

4711 Golf Rd., 1 Concourse
Skokie, Ill. 60076
(312) 677-2600
Alan Anixter, president
William Anixter, executive vice president

Cable interests:
- Buys, stores and distributes electrical wire and cable products.

A major supplier of electrical wire, cable and a range of components and other equipment to the industry, Anixter enjoyed another year of steady growth in 1982. Anixter brought in revenues of $537.7 million, a 22 percent increase over 1981 revenues of $441.4 million.

During fiscal 1982, Anixter computerized its distribution network, which has 12 subsidiaries in the United States, Canada, England and the Netherlands. Anixter-Pruzan Inc. handles all sales and manufacture of goods related to cable services in North America, including hardware, pay TV packages, video equipment, subscriber drop materials, tools, safety equipment and satellite dishes.

Augat Inc.

89 Forbes Blvd., Box 448
Mansfield, Mass. 02048
Roger Wellington, chairman
William Miller, president

Cable interests:
- Manufactures cable connectors: Vitek traps, line amplifier replacement electronics, amplifiers for house drop and apartment applications.
- LRC Electronics.
- Vitek Electronics.
- Broadband Engineering Inc.
- Reed Devices Inc. (acquired in March 1982).
- Pylon Co. (acquired in March 1982).

Augat used a slow year in the industry to expand its product line and bring several new companies into the Augat family of electronics manufacturers. In March 1982, both Reed Devices Inc., a manufacturer of terminal blocks, and Pylon Co. of North Attleboro, Mass., a supplier of test fixtures and precision spring probes, were acquired by Augat. Augat also entered the rack merchandising market, packaging switches, IC sockets, connectors and terminal blocks for individual "over-the-counter" sales in retail electronics stores.

Corporate revenues slipped 1 percent in 1982, down to $188.2 million from 1981's $190.1 million. Income fell more sharply, down some 16 percent, from $38.8 million in 1981 to $32.4 million in 1982.

Augat manufactures and supplies cable connectors, security traps, interconnections products, microcircuits, packaging sub-miniature switches, precision-machined parts and, for building drops, Signal Stretcher amplifiers. The company also markets line amplifier replacement electronics. In 1982, Augat expanded their fiberoptics line with a digital data link that transmits information at 25 megabits second up to 2 kilometers.

Burnup & Sims

1333 S. University Dr.
Fort Lauderdale, Fla. 33324
(305) 587-4512
Nick Caporella, president
Michael Goldwire, vice president and assistant

Cable interests:
- Burnup & Sims Cable Com Inc.
- Cablevision Services.
- Control Com Inc.
- Lectro Products.
- Consolidated Cable Corp.
- Gardiner Communications.

Top 50 financial overview (Continued from page 139.)

Company	Total revenues '82	Total revenues '81	Total revenues % ch.	Net Income '82	Net Income '81	Net Income % ch.	Total assets '82	Total assets '81	Total assets % ch.
Anixter Brothers[13]	535.6	501.2	6.9	13.3	17.5	-24.2	221.1		
Rollins Inc.[14]	526.5	454.6	15.8	46.0	44.4	3.6	399.6	313.5	27.5
Cox Communications	514.7	403.5	27.6	65.4	55.5	17.9	800.1	604.4	32.4
Wometco Enterprises	493.4	434.2	14.0	26.0	24.4	7.0	478.2	448.2	6.7
Harte-Hanks Comm.[15]	396.9	348.5	14.0	25.7	24.3	6.0	441.7	397.8	11.0
Storer Comm.[16]	379.3	276.4	37.2	9.2	31.9	-71.0	1,144.7	844.6	31.9
Taft Broadcasting	358.2	239.9	49.0	38.8	24.3	60.2	611.9	579.1	5.7
Scientific-Atlanta	337.2	277.3	21.6	14.2	19.0	-25.5	247.5	197.2	25.5
Tele-Communications Inc.	282.6	181.4	55.7	10.4	12.8	-19.0	916.7	608.3	50.7
Viacom International[17]	274.8	210.4	30.6	24.6	18.9	29.9	663.8	443.8	43.9
Affiliated Publications[18]	259.4	236.1	9.9	15.8	14.2	11.0	148.8	125.6	18.4
Rogers Cablesystems[19]	244.4	109.6	122.9	(10.5)	2.2	-572.9	901.5	420.9	114.2
Burnup & Sims[20]	237.0	208.8	13.5	9.3	8.5	8.4	159.0	139.9	13.7
Multimedia Inc.	225.5	195.3	15.5	28.9	25.8	12.2	285.7	256.1	11.6
Playboy Enterprises[21]	210.1	221.5	-5.1	(51.7)	13.7	-447.4	175.2	248.8	-29.6
Augat Inc.	188.3	190.2	-1.0	20.2	22.7	-10.9	194.1	176.5	9.9
Turner Broadcasting Systems[22]	165.6	95.0	74.3	(3.4)	(13.4)	300.7	135.2	76.9	75.7
United Cable Television Corp.[23]	99.8	62.8	58.9	15.1	7.8	93.3	262.5	155.4	68.9
Scripps-Howard[24]	95.6	87.3	10.0	19.5	19.2	2.0	126.1	112.8	11.8
Heritage Comm.[25]	94.8	77.2	23.0	6.1	3.8	61.0	127.7	111.8	14.0
Continental Copper & Steel Industries[26]	63.3	69.9	-9.4	(13.1)	6.7	-294.4	59.8	89.6	-33.3
Sammons Enterprises[27]									

All figures are stated in millions.
[1]Cable revenues, operating income and identifiable assets represent the Communication Products Division.
[2]Cable revenues, operating income and identifiable assets represent the Broadcast and Cable Divisions.
[3]Cable revenues, operating income and identifiable assets represent the Other and Corporate segments, which include cable holdings.
[4]Cable revenues, operating income and identifiable assets represent Warner Amex only.
[5]Cable revenues, operating income and identifiable assets represent the Broadcasting, Cable and Entertainment Divisions.
[6]Total revenue is actually total operating revenue.
[7]Cable revenues, operating income and identifiable assets represent Broadband Communications.
[8]Cable revenues, operating income and identifiable assets represent the Broadcasting and Cable Television Divisions.
[9]Cable revenues, operating income and identifiable assets are for Continental Cablevision only.
[10]Cable revenues, operating income and identifiable assets represent Insilco's high technology sector of which Times Fiber contributes approximately 63 percent of revenues.
[11]Operating income is actually operating profit.
[12]Cable revenues, operating income and identifiable assets represent STV and Communications Equipment.
[13]All figures are unaudited 12 months ended Jan. 31, 1983.
[14]Cable revenues, operating income and identifiable assets represent the Media Division, which includes television, radio and advertising operations.

Cable revenues			Operating income			Identifiable assets			Stock prices	
'82	'81	% ch.	'82	'81	% ch.	'82	'81	% ch.	'82 hi/lo	'81 hi/lo
									19/12	20.50/8.75
69.2	62.1	11.4	20.1	18.3	10.2	73.5	52.6	39.9	19¼/13	22½/13⅜
261.5	188.5	39.0	37.7	30.5	23.0	541.2	391.1	38.4	48/23⅛	39⅛/27⅛
46.5	32.9	41.0	9.5	4.7	103.0	116.8	95.9	21.8	26/13⅜	20¼/11¾
74.8	67.9	9.9	19.1	16.5	15.9	135.7	128.2	5.9	41⅞/21¼	40¾/29
222.7	132.8	67.7	61.4	37.3	64.3	909.4	629.1	44.5	34½/19	43/23¾
						10.5			35.75/25.38	34.00/24.25
									32.75/11.13	34.75/12.63
265.6	167.7	58.4	58.5	29.9	95.1	825.0	574.2	43.7	28¼/12¾	31⅝/16⅝
112.9	85.2	32.5	19.3	15.7	22.8	220.3	150.1	46.7	35⅛/17¼	32½/22
									28/15⅞	22½/17¾
122.4	8.2	1,388.6	20.9	(.85)	2563.7	564.9	64.3	778.2	8.38/4.00	13.25/5.63
97.0	89.9	8.0	8.8	8.2	7.0	53.4	31.8	68.2	17⅛/8⅛	17⅛/8½
32.8	19.4	69.0	5.7	3.3	74.0	99.0	76.9	28.7	33⅝/18⅛	24⅛/18
.58	4.6	-87.3	(4.4)	(5.3)	17.9	4.2	2.3	85.6	12⅝/5¾	17⅜/10½
									33.50/20.38	34.00/23.75
52.6	28.9	82.3	(16.3)	(11.0)	-47.8	38.3	16.0	138.9	19½/8½	20/7⅛
									31¾/18½	36¾/14⅛
5.3	2.2	143.0	(3.3)	(.96)	-246.0	38.7	18.9	104.9	26¾/16¾	23¼/11⅝
35.5	27.5	29.2	7.9	6.1	29.3	87.3	72.6	20.3	17⅛/13½	19/15½
9.8	11.1	-11.8	(.06)	.47	-112.9	5.4	6.4	-14.9	7½/3⅛	8½/5¼
78.7	62.6	25.6	18.0	13.3	36.1	142.6	106.2	34.3	private firm	

[15]Cable revenues, operating income and identifiable assets represent television, radio and cable operations.
[16]Operating income includes depreciation.
[17]Cable revenues, operating income and identifiable assets represent system operations only.
[18]McCaw is considered an investment and the company uses equity method of accounting.
[19]Cable revenues, operating income and identifiable assets are U.S. operations only. The large increase is due to acquisition of United Artists in the fall of 1981.
[20]Cable revenues, operating income and identifiable assets represent Cable, REA and Electrical services (40.9 percent of total).
[21]Cable revenues are actually net sales and revenue from continuing operations. Cable revenues, operating income and identifiable assets include videocassette and disc sales, STV and cable programming operations.
[22]Cable revenues, operating income and identifiable assets do not include WTBS.
[23]Total revenues, net income and total assets are for cable operations minus approximately $8 million attributed to HEN Inc.
[24]Scripps-Howard is owned by E.W. Scripps. Cable revenues, operating income and identifiable assets are combined totals for partnerships and subsidiaries.
[25]Display group figures are not included in cable revenues, operating income and identifiable assets.
[26]All figures have been restated to reflect Hatfield as a discontinued operation.
[27]Sammons Enterprises is a privately owned company, and would not reveal total revenues, net income and total assets. Nor does Sammons offer public stock.

■ Capscan Cable
(All companies design, engineer, manufacture or install cable equipment.)

Communication interests:
■ Approximately 16 subsidiaries manufacture for the telephone industry.

Compared to 1981, last year was a growth period for Burnup & Sims, whose revenues increased 14 percent over 1981, rising to $237 million. A leading telecommunications and cable television service company, Burnup & Sims' 22 subsidiaries are involved in the design, production, installation and service of commercial and utility telephone service, cable television, satellite earth station electronics, emergency power systems, security systems and coaxial cable. The company also has a string of movie theaters and bottling plants.

Almost 41 percent of revenues were produced by cable television, REA and electrical services. Burnup & Sims has installed more than 20 percent of the 500,000 miles of cable plant in the United States. In 1982, cable operations brought total revenues of $97 million. Burnup & Sims increased its versatility in 1982 by acquiring Lectro Products Inc., a manufacturer of power supply units for cable television, Consolidated Cable Corp., an installer of cable television systems, and Capscan Cable Co. Inc., a manufacturer of coaxial cable for cable television systems. The newly acquired companies are responsible for about a $14 million increase in revenues for 1982.

Net income was $9.2 million for 1982, compared to 1981's net of $8.5 million. In 1982 Burnup & Sims broke the 5,000 employee mark, most of whom are employed in the Sunbelt and California.

Capital Cities Communications

24 E. 51st St.
New York, N.Y. 10022
(212) 421-9595
Thomas Murphy, chairman
Daniel Burke, president

Cable interests:
■ Capital Cities Cable Television Division. 314,283 subs in 53 systems.
■ Fairchild Publications. Publishes numerous periodicals, including *Multichannel News*.
■ *The Cable Connection*. Cable magazine joint venture between *Fort Worth Star-Telegram* and Capital Cities' local cable franchise.
■ Star-Text. Videotex service joint venture between the *Star-Telegram* and Tandy Corp. 300 subs.

Communication interests:
■ Six television stations.
■ 14 radio stations: seven FM, seven AM.
■ Seven daily newspapers.
■ 10 weekly newspapers.
■ International Medical News Group.
■ Professional Press Group.
■ American Traveler Group.

Capital Cities had its 28th consecutive year of increased growth in 1982. Revenues increased 15.6 percent, from $573.7 million in 1981 to $663.5 million in 1982. Net income was up a healthy 20 percent, from $80.5 million in 1981 to $96.3 million in 1982.

Capital Cities' Cable Television Division generated a profit this year, for the first time in its three-year history. The division made a profit of $1.7 million on sales of $53.3 million in 1982, as opposed to last year's $3.1 million loss on total revenues of $21.4 million.

The bulk of Capital Cities' cable holdings came through the company's purchase of Cablecom-General Inc. in 1981, whose 43 systems cost Capital Cities $139 million. Capital Cities also acquired Cablecom's partial interest in three smaller companies through the deal, and in October 1982 Capital Cities acquired the remaining interests in the three systems, the largest being Community Cablevision of Odessa with 23,000 subscribers, for $16.5 million.

Today, with 53 systems and 314,283 subscribers, Capital Cities Cable is the 15th-largest MSO in the nation. It spent $31.1 million on capital improvements and acquisitions in 1982, 13 percent more than 1981's $27.1 million. Most of the expenditure was for improvement on existing systems, however, as Capital Cities believes that acquisitions prices of cable systems are "unreasonably high" in the present market.

System operation is the major aspect of Capital Cities involvement with cable, but its publishing branch also is involved in several aspects of cable, ranging from electronic publishing experiments to a weekly cable/industry newspaper, *Multichannel News*, which is owned by Fairchild Publications, a Capital Cities subsidiary. *The Cable Connection* is operated as a joint venture between Capital Cities' *Fort Worth Star-Telegram* and the company's local cable franchise. The newspaper also is running a videotex experiment in Fort Worth, Texas, in conjunction with Tandy Corp.

In all, aside from cable operations, the company owns six television stations, 14 radio stations, seven daily newspapers, numerous weekly papers, specialized business publications and a small television production operation.

CBS Inc.

51 W. 52 St.
New York, N.Y. 10019
(212) 975-4321
Thomas Wyman, chairman

Cable interests:
■ Black Hawk Cable Communication Co. One system in Dallas/Fort Worth area. Subs: 20,000.
■ Proposed Extravision multichannel over-the-air pay video service in five markets where CBS owns television stations.
■ Venture One market test of videotex home information service in Ridgewood, N.J.

Communication interests:
■ Seven AM, seven FM radio stations.
■ CBS Radio Network.
■ RadioRadio young adult radio network.
■ Five television stations.
■ CBS Television Network Division.
■ CBS Entertainment Division.
■ CBS Sports Division.
■ CBS News Division.
■ CBS Theatrical Films Division.
■ CBS Record Division.
■ CBS Records International Division.
■ CBS Video Enterprises.
■ CBS Publishing Group—consumer publishing: 10 magazines, educational and professional publishing.
■ CBS Technology Center.

In 1982, CBS continued its exploration of cable possibilities, pushing forward in several areas but discontinuing its primary cable service. The recently launched CBS Cable service was eliminated, despite its 4 million subscribers in 350 cable systems. But CBS/Fox Co., a joint venture formed in July 1982 with 20th Century-Fox Video, is already the nation's largest marketer of videocassette and videodisc home entertainment. The new partnership also is involved in creating original videodisc material, using studio networks from both CBS and Fox.

CBS also is producing films for cable and home video as part of the new major motion picture production company formed in conjunction with Columbia Pictures and HBO. The new studio (Nova) will be involved in all aspects of motion picture production and will release movies both to theaters and on a pay-per-view basis.

On an experimental level, CBS' Venture One market test of a videotex home information service has entered its second phase in Ridgewood, N.J. The first phase generated a high level of usage and produced positive consumer interest in acquiring the service on a commercial basis. The second phase will introduce additional services to the system, including at-home banking.

Pending FCC approval, CBS is planning to test a multichannel over-the-air pay video service in the five markets where it owns television stations. CBS also is waiting for the FCC nod to begin its Extravision teletext service nationally over the CBS Television Network, which will provide constantly updated news and information in written form. Also pending final approval is CBS' purchase of KRLD-AM, Dallas, and Texas State Networks from Metromedia for $27 million.

In 1982, CBS ended an 11-year absence from cable system ownership with the purchase of Black Hawk Cable Communications, a 20,000-subscriber system in the Dallas/Fort Worth area. In addition to anticipated profitability, CBS hopes to use the system as a research and development tool for studying cable system operation and observing viewer preferences.

CBS owns five television stations and 14 radio stations, along with a network of over 200 broadcast affiliates. CBS' extensive involvement in entertainment brings it into contact with cable in diverse ways. As the world's largest producer, manufacturer and marketer of recorded music, CBS has been making promo videotapes for years, and is now a major source of music videos for MTV and the musical programs on USA Network and HBO. CBS' Toy Division has an exclusive marketing contract with ColecoVision, and develops and markets its own video games through its Video Games unit.

Revenues in 1982 for CBS were about $4.12 billion, compared to 1981 revenues of $3.95 billion. Despite the rise in revenues, net income was off some 25 percent, down to $122.5 million in 1982 from a 1981 net income of $162.8 million.

Cox Communications Inc.

1601 W. Peachtree St. NE
Atlanta, Ga. 30309
(404) 897-7000
Clifford Kirtland, chairman
William Schwartz, president

Cable interests:
- Cox Cable Communications, 61 systems, 1.3 million subs, (1/31/83).
- Indax two-way interactive communications system experiment in San Diego, Calif.
- FirsTicket, Joint venture test of pay-per-view system with ABC Video Enterprises.
- CommLine, Institutional business communications network being tested in Omaha, Neb.
- *ON Cable* magazine, Monthly programming guide.
- Spotlight, (25 percent share) managed by Times Mirror, 735,000 subs (12/82).
- Rainbow Programming Services, Minority interest with Daniels & Associates and Cablevision.
- Robert Wold Company (19 percent share).

Communication interests:
- Six television stations: five VHF, one UHF.
- 12 radio stations: five FM, seven AM.
- TeleRep, Television sales rep firm (39 stations).
- Chrystal Co. Radio sales rep firm.
- Schulke Radio Productions, Music syndication firm.
- Cellular radio applications in Charlotte, N.C. (with Cybertel); Omaha, Neb.; and Oklahoma City, Okla. (with Cybertel).

The Cox Cable division accounted for $261.2 million of Cox Communications' $514.7 million total revenues in 1982, making it the largest division in the company. It is also the fastest growing, its 39 percent increase in revenues since 1981's $188.4 million, surpassing its parent company's still respectable 27.6 percent gain over total 1981 revenues of $403.4 million.

Cox Cable operates 61 systems in 19 states, having lost one system in 1982. The city of Marquette, Mich., failed to renew Cox's franchise and the ensuing dispute resulted in Cox suing the city for alleged franchising process irregularity. The lawsuit is still pending.

Despite the lost franchise, subscriptions increased 29 percent to a total of about 1.3 million. While sign-up goals were met, Cox reported having a common problem in today's economy—retaining subscribers.

In 1982, Cox Cable conducted several tests of new cable technology or systems. Indax, a two-way interactive communications system, continues to be test-marketed in San Diego, Calif. Cox Cable reports that, while the technical aspects of Indax have been perfected, they still are evaluating packaging concepts and subscribers' preferences before offering the system commercially. Another new service, CommLine, is an institutional business communications network. It was introduced by Cox Cable in Omaha, Neb., in June 1982, and is intended to provide supporting data and video communications services to businesses, municipal, health and social agencies. FirsTicket is a pilot test program announced as a joint venture between Cox Cable and ABC Video Enterprises. It is designed to examine the full range of cable home entertainment, and will provide selected subscribers in Santa Barbara and San Diego with movies and special events on a pay-per-view basis.

Other Cox Cable ventures include the acquisition of the *ON Cable* monthly program guide and a partial equity in the Spotlight movie service and Rainbow Programming Services (Bravo, The Playboy Channel).

In addition to cable, Cox owns a chain of six television and 12 radio stations, as well as a sizeable wholesale automobile auctioning business. Cox's income was $65.4 million in 1982, a 17.9 percent increase over 1981's $55.4 million.

Continental Copper & Steel Industries Inc.

12 Commerce Dr.
Cranford, N.J. 07016
(201) 272-3850
Charles Mansfield, chairman
William O'Brian, president

Cable interests:
- CCS Cable—division manufacturing coaxial cable for the cable television industry.

After a disappointing year in 1981, Continental Copper & Steel suffered another year of reduced revenues and decreased assets in 1982. A 10 percent drop in revenues in 1982, down to $63.2 million, coupled with the closing down of CCS' Hatfield Wire & Cable division, produced a net loss of $13 million. CCS' continuing operations, in exclusion of the Hatfield division, reported a profit of $43,000 on sales of $63.2 million.

Continental's CCS Cable division fell short of expectations, and the company cited heavy initial cost and extremely high rates of interest delaying planned cable systems. CCS hopes that improvement of the national market will produce a surge of CATV system installations next year.

Continental also owns a plant in Mexico manufacturing steel, alloy and a variety of forged products. Two other Continental divisions, Braeburn Alloy, a manufacturer of high-grade steel for tool production, and Hanover Wire Cloth, a producer of screening for industry and home use, exhibited steady growth, with Hanover reporting record sales and profits, despite the depressed construction industry it serves.

Dow Jones & Co.

22 Cortlandt St.
New York, N.Y. 10007
(212) 285-5000
Warren Phillips, chairman
Ray Shaw, president

Cable interests:
- Dow Jones News Service
- Dow Jones Retrieval
- The Wall Street Journal Late News
- Continental Cablevision Inc. (24.5 percent)

Communication interests:
- *The Wall Street Journal*
- The National Business Employment Weekly
- The Wall Street Journal Report
- *Barron's Magazine*
- Dow Jones Capital Markets Report
- Dow Alert
- Ottaway Newspapers
- Richard D. Irwin Inc.
- American Demographics

Dow Jones observed its 100th anniversary in 1982, and celebrated a year of record earnings, posting a 23.4 percent gain over the prior year. In 1981, the company purchased a 24.5 percent interest in Continental Cablevision Inc., now the country's 10th-largest MSO with more than 600,000 subscribers. In 1982, Continental exceeded by a significant margin the earnings forecasts and other projections made at the time of the investment.

The company's electronic publishing arm, Information Services Group, also experienced strong gains in 1982. Dow Jones News Service, the core newswire known as "the broadtape," was displayed on 25,400 teleprinters and video terminals in stock brokerage firms, banks and corporate offices, a 9 percent increase over 1981.

Dow Jones is making a major commitment to assure that the company maintains its role as a supplier of computerized news and information on demand. The company made its entry into software publishing in 1982, introducing four computer programs for the business and investment needs of personal computer users. The software, for use on Apple computers, will be supplemented in 1983 with programs for IBM personal computers.

The company's data base publishing unit, Dow Jones News/Retrieval, expanded its subscriber list and broadened the number of data bases, with nearly 60,000 customer terminals accessing information from Dow Jones' computers.

Continental Cablevision invested more than $100 million in new systems in 1982; the bulk went into construction of franchises in the suburbs of St. Louis, Chicago, Boston, Detroit and Cleveland. The company also made applications for approximately 20 new franchises. One is a 50-50 joint venture with 11 prominent black businessmen for a system in part of Chicago. In early 1983, the joint-venture was designated by the City Council to build one of the city's five systems. Cable revenues were up 50 percent over the previous year, operating income rose 36.5 percent, and identifiable assets climbed 50.4 percent over year earlier totals.

General Electric Co.

Fairfield, Conn. 06431
(804) 483-5000
John Welch Jr., chairman
John Burlingame, vice chairman

Cable interests:
- General Electric Cablevision—systems in California, Illinois, Indiana, Michigan, Mississippi and New York. Total: 12 systems. Subs: 309,600 (3/1/83).

Communication interests:
- Two television stations.
- Three AM and five FM stations.

As the 16th largest MSO, with 309,600 subscribers in six states, GE Cablevision's activities for 1982 rate a single sentence in General Electric's annual report, which it shares with GE's television and radio stations: "Broadcast and cablevision revenues and earnings showed continued growth." Indeed, with $26.5 billion in revenues last year—a 3 percent drop from 1981's revenues of $27.2 billion—giant GE has a lot going on in addition to cable television. A quick look at the "consumer products" division where GE Cablevision is a minor inhabitant, finds major appliances, lighting products, housewares, air conditioners, televisions and audio products. Other GE interests, produced by its manufacturing arm, include aircraft engines, industrial motors, transportation systems, electrical equipment, power plant generators, transformers, switchgear, nuclear reactors and related equipment, batteries, plastics and other engineered materials, technical systems for the electronics, aerospace and medical industries, not to forget robots. GE also develops software and extracts minerals and energy sources. GE acquires and disposes of too many properties on a regular basis to list them all—over the past two years, 199 transactions involving acquisitions, joint ventures, formations of new companies and dispositions took place, with the largest being the sale of GE's holdings in Utah International to an Australian firm for about $2.4 billion. Total assets in 1982 rose to around $21.6 billion.

While it is inevitable that GE's high technology research and development program will affect the cable industry, one development in 1982 could have immediate results once employed. The Comband bandwidth compression system, while not yet in production, could be a godsend for overcrowded cable systems because of its ability to double the number of channels transmitted over existing plant.

General Instrument Corp.

1775 Broadway
New York, N.Y. 10019
(212) 974-8700
Frank Hickey, chairman

Cable interests:
- Broadband communications and computer divisions. Manufactures addressable converter/descramblers, converters. Jerrold division is a major manufacturer of CATV products.
- PlayCable. A 50-50 joint venture with Mattel providing videogames via cable.
- United Satellite TV. A 14.1 percent equity interest in a direct satellite-to-home broadcast venture headed by Prudential Insurance, USCI and others.
- Sytek. General Instrument acquired 51 percent of this designer of broadband digital networking systems and supplier of modems and multiplexers in September.

Communication interests:
- MATV product manufacturer.
- Data Systems. On-line wagering systems and business systems for data transmission.
- Semiconductor Products.

In a year when many cable companies complained of a slow industry, General Instrument recorded its sixth year in a row of record earnings and revenues. Revenues increased 16 percent, from $825 million in 1981 to $957 million in 1982. Net income jumped 32.2 percent, from $68.1 million in 1981 to $90 million in 1982.

Primarily a company that develops data systems and manufactures semiconductor products, computer components and broadband communications equipment, General Instrument has announced its intentions of gaining a significant share of the satellite TV earth station market. In March 1981, the company signed an agreement with SED Systems Inc. of

Canada to license their 4 and 12 GHz technology for use in GI's newly developed line of low-cost satellite earth stations. General Instrument also has purchased a 14.1 percent share of United Satellite Television, a joint venture with Prudential Insurance, USCI and several other investors, intending on beginning direct satellite-to-home transmissions in the summer of 1983.

General Instrument's broadband communications division has had a busy year, shipping over 300,000 CATV subscriber terminals each month at the end of 1982. Best known for its Jerrold line, General Instrument was the first CATV equipment manufacturer to develop a 52-channel amplifier, the Jerrold System 400. The company responded to industry demand for addressable converters by introducing its addressable Starcom IV 58-channel digital converter in 1982, and announced a complete line of 450 MHz cable distribution products to be introduced.

General Instrument also is involved in interactive television products. Its BroadCom system provides two-way voice, data and video communication using a single broadband coaxial cable. Through a joint venture with Mattel, General Instrument's PlayCable, an interactive system allowing the viewer to choose and play video games through cable, was launched in seven cable systems in the New York area. The company also is continuing testing in the burgeoning cable home security field, completing a test of Jerrold's 11-function security system in Long Island.

Cable revenues amounted to $409.5 million in 1982, a 35.9 percent improvement over 1981's $301.3 million. General Instrument's cable equipment production capacities were increased in September when the company agreed to acquire 51 percent of Sytek Inc.

General Telephone & Electronics Corp.

One Stamford Forum
Stamford, Conn. 06904
(203) 965-2000
Theodore Brophy, chairman
Thomas Vanderslice, president and chief operating officer

Cable interests:
- Sylvania CATV Transmission System Division—manufactures trunk amplifiers, line extenders, converters and addressable converters.
- GTE Telenet Communications Group—designs and operates communication systems, e.g. electronic mail, medical, financial and credit information networks.
- Two communication satellites to be launched in 1984.

Communication interests:
- Three international telephone companies.
- Sixteen domestic telephone companies.

In addition to its benefit as a developer and manufacturer of high technology products and services, GTE, through its Sylvania CATV Transmission System division (which was acquired by Texscan Corp. in April 1983) was one of the cable industry's top suppliers of transmission equipment, including a full range of trunk amplifiers, line extenders and 58-channel converters. In 1982, GTE expanded its product family with a new line of addressable converters.

Despite cable-related revenues of $2.5 billion, 12 percent higher than the previous year, the largest division of GTE is not cable, but telephone operations. GTE's domestic and foreign telephone companies collected $7.8 billion in revenues during 1982, a billion dollar improvement over the previous year. GTE acquired Southern Pacific Communications, operators of the Sprint phone service, as well as Southern Pacific Satellite Co., which will operate GTE's Spacenet satellite system.

GTE's Telenet Group, while registering considerable growth and expansion in the area of data communication network services, registered a $15 million net loss on sales of $137 million. In 1982 it began operation of its Finet financial information network service, and Minet, a medical information network.

In 1982, GTE took in a total $12.6 billion in revenues, an increase of 9 percent over 1981 revenues. Income was $843 million, a 17.7 percent gain over 1981.

Getty Oil Co.

3810 Wilshire Blvd.
Los Angeles, Calif. 90010
(213) 739-2100
Sidney Peterson, chairman
Robert Miller, president

Cable interests:
- Entertainment and Sports Programming Network Inc. (85 percent).
- Agreement with ABC to begin a pay-per-view sports channel, RSVP.

Normally, a cable network with a 23 million household subscriber base is considered fairly impressive, but despite its size, the Entertainment and Sports Programming Network practically fades to insignificance when compared to its parent company, the massive Getty Oil Co. With total assets falling just below $10 billion last year, and 1982 revenues of $12.3 billion, Getty managers are not losing any sleep worrying about the cable industry. In fact, ESPN does not even merit a division of its own, but is lumped under the Diversified Operations Division, along with lumber and real estate.

As the name suggests, Getty Oil activities center on exploring, producing, transporting, refining and marketing petroleum. With almost 20,000 employees, Getty owns oil and natural gas reserves offshore in the Gulf of Mexico, in 25 states in this country, the United Kingdom sector of the North Sea, Saudi Arabia and Kuwait. But, impressive as Getty's 1982 revenues sound, they still represent a 7.1 percent drop from 1981 revenues of $13.2 billion, and income fell 19.3 percent, from $856.8 million in 1981 to $691.5 million in 1982.

Getty's energy pursuits are not only confined to oil, however. The company is actively engaged in drilling for natural gas, mining coal and uranium and developing synthetic fuel. In addition to energy, Getty has diversified into such areas as agricultural operations; real estate; forest products, plastics; chemical fertilizers; life, casualty and property insurance; and, of course, cable television programming. Besides ESPN, which, at 23 million subscribers, is one of the largest advertiser-supported cable services in the country, Getty has just begun a joint venture with ABC to develop and operate a pay-per-view satellite programming service—RSVP—featuring major sports presentations. As part of the agreement, ESPN will obtain selected events from ABC for broadcast on its basic cable service, and ABC will secure options to acquire a minority interest in ESPN.

In 1982, ESPN increased its subscriber base 71 percent, from only 13 million in 1981. Cable affiliates increased 67 percent to 5,052, and national advertisers increased 63 percent to 260. Despite these figures, ESPN continued to operate at a loss, but Getty officials say that they will continue investing in cable.

Gulf+Western Industries Inc.

1 Gulf+Western Plaza
New York, N.Y. 10023
(212) 333-7000
Charles Bluhdorn, chairman
David Judelson, president

Cable interests:
- USA Network (33 percent) advertiser-supported basic

network, owned with MCA Inc. and Time Inc.; 17 million subs (4 83).
- Madison Square Garden Network Division. Supplier of sports and entertainment programming originating from Madison Square Garden (1.4 million subs).
- United International Pictures. Joint venture owned by Paramount, MCA Inc. and MGM/UA Entertainment. Distributes theatrical pictures to theaters and cable.

Communication interests:
- Sega Enterprises (90 percent). Designs, manufactures and distributes coin-operated video games and licenses home video game designs.
- Simon & Schuster. Book publisher.
- Famous Music Corp. Creates and publishes music.
- Madison Square Garden Corp.
- Paramount Motion Pictures.
- Paramount Television.

With a third share of USA Network—the rest being split between Time Inc. and MCA Inc.—Gulf+Western's Paramount Video has part of one of the largest cable networks in the industry. USA Network is a full service, advertiser-supported basic cable network with 17 million subscribers.

Paramount's second cable channel derives its programming from a single source: events taking place at Madison Square Garden in New York City. MSG Cablevision now brings 1.4 million subscribers 135 Garden events a year, and is planning to offer an expanded advertiser-supported service in 1983 that will feature nine hours of programming a day.

A new venture that adds an additional dimension to Paramount's involvement with cable is United International Pictures, a joint venture owned by Paramount, MCA and MGM/UA Entertainment. The new company will produce and distribute theatrical motion pictures to both the theater and cable industries.

Gulf+Western groups its cable service into its Leisure Time division, a subsidiary that also includes Famous Music, Simon & Schuster and Paramount Pictures. In 1982, Gulf+Western's total revenues fell 2.7 percent, from $5.47 billion in 1981 to $5.33 billion in 1982. Income dropped considerably, down 42 percent, from $290 million in 1981 to $168 million in 1982.

Besides cable and movie activities, G+W manufactures clothing, energy and industrial products, automotive components and replacement parts. It owns cement, chemical, zinc and sugar operations, a tourism business in the Dominican Republic and Consolidated Cigar Co. G+W also owns a 90 percent interest in Sega Enterprises, which designs, manufactures, distributes and operates electronic video games in the United States and Japan, and has recently signed agreements with Coleco and Parker Bros. for the marketing of home versions of Sega games.

Harte-Hanks Communications Inc.

40 N.E. Loop 410
San Antonio, Texas 78216
(512) 344-8000
Robert Marbut, president and CEO
Larry Franklin, chief operating officer

Cable interests:
- Harte-Hanks Cable Television. Owns nine systems with 47,700 subs in Colorado and Texas. Manages eight systems with 26,100 subs in Texas and Arizona, with options to acquire. Also has agreement to purchase UltraCom Inc. and Southwestern Satellite in 1984.
- Cable "Shopper's Channel" developed in San Antonio, Texas.
- KENS. Originates TV news feeds for SNC.
- RMH Research Inc. Serves as research coordinator in two-year electronic publishing test conducted by AP and CompuServe.
- Teletext projects planned in late 1983.

Communication interests:
- 87 newspapers.
- 11 radio stations: six FM, five AM.
- Six theme parks.
- Consumer Distribution Marketing. Mailing services.
- Four television stations.
- Tele-Research Item Movement and Tele-Research Inc.

After 44 straight quarters of earnings growth, Harte-Hanks didn't let something like a major recession ruin its streak. Total 1982 revenues reached another all-time high of $396.9 million, a 14 percent increase over 1981's revenues of $348.5 million. Net income was up 8 percent, from $25.3 million in 1981 to $27.2 million in 1982. Harte-Hanks total assets rose 11 percent, from $397.8 million in 1981 to $441.6 million in 1982.

Harte-Hanks, which is involved in a spectrum of communication interests, entered the cable field in 1978 and has steadily expanded its cable operations since then through acquisitions, franchising and various option agreements. Harte-Hanks owns nine systems in Texas and Colorado, containing 78,500 homes and serving 47,700 basic and premium subscribers. It manages eight more systems in Texas and Arizona, containing 36,300 homes and serving, at the end of 1982, approximately 26,100 subscribers. Harte-Hanks has the option to purchase these systems, and plans to do so by 1984. The company also has options to acquire UltraCom, with 66,700 subscribers in 15 systems in eight states and two systems under development, and Southwestern Satellite, which serves 3,800 subscribers in a single system in the Houston area. Harte-Hanks plans to purchase these systems as well.

Harte-Hanks' cable and broadcast operations brought $74.7 million in revenues in 1982, a 10 percent rise from 1981's revenues of $67.9 million. Harte-Hanks also spent $4.2 million in 1982 to revitalize its oldest cable system, located in a Houston suburb.

Besides cable and broadcast holdings, Harte-Hanks owns numerous daily and weekly newspapers, advertising and specialty publications, commercial printing facilities, "target distribution" systems, direct-mail services, market research operations and an entertainment production company. Harte-Hanks' latest acquisition is a consumer shopping channel on their cable TV system in San Antonio, Texas. After only a few months of operation, Harte-Hanks reports that the new channel is turning a profit.

Heritage Communications Inc.

2195 Ingersoll Ave.
Des Moines, Iowa 50312
James Hoak Jr., president
James Cownie, executive vice president

Cable interests:
- Heritage Telecommunications Group. 114 systems in 13 states; 275,000 subs.
- Iowa Cable Network.
- Six limited partnerships developed during 1982 and 1983 to acquire systems.
- Telecommunications Group Marketing Department. Designed to increase basic and pay penetration, as well as revenue per subscriber.
- Display Communications Group. Designs and constructs retail cable stores. Created booths for cable suppliers at NCTA convention.

Communication interests:
- Shaw-Barton. Calendar and specialty advertising operations.
- Oravisual Co. Produces meeting and educational aids.
- Braun-Brumfield. Book manufacturer.

If there was a slump in the economy in 1982, you wouldn't know it from looking at Heritage Communications' performance. Revenues increased 23 percent, from $77.1

million in 1981 to $94.8 million in 1982. Earnings were up even more, rocketing 61 percent, from $3.8 million in 1981 to $6.1 million this year.

Heritage Communications' Telecommunications Group, which is devoted almost entirely to cable operations, had an equally impressive year. Revenues increased 29 percent in 1982 over 1981's $27.4 million, up to $35.5 million. Assets were up 20 percent, from $72.5 million to $87.2 million in 1982, as the group added 18 new franchises and renewed 10 others, giving the group approximately 275,000 subscribers in 200 communities over 13 states. With 114 cable systems, Heritage is ranked number 19 in the top 100 MSOs in the country. Over the year basic subscribers increased by 15 percent and pay subscribers were up by 24 percent, rapid subscriber growth being led by Heritage's Texas system, which increased by a third during 1982, from 21,902 to 29,226 subscribers.

To help soften the impact of the tremendous cash outflow required by extensive cable development, Heritage has diversified into other fields, notably educational products and advertising. Collected under Heritage's second major division, Marketing Products and Services, are four recently acquired companies: Shaw-Barton, a manufacturer of calendar and specialty advertising products; the School Annual Publishing Co., a publisher of school yearbooks; Orivisual, a producer of meeting and educational aids, such as easels, lecturns and pads; and Braun-Brumfield, a short-run book manufacturer. Heritage also has a Display Communications Group, which develops exhibits for trade shows and designs and constructs cable and phone stores.

Insilco Corp.

1000 Research Parkway
Meriden, Conn. 06450
(203) 634-2000

Durand Blatz, chairman
Donald Harper, president

Cable interests:
- Times Fiber Communications (75 percent interest). Manufactures coaxial, multiconductor and fiberoptic cables.

Communication interests:
- Taylor Publishing Co.
- Stewart Stamping. Manufactures small precision parts for the electronics industry.
- Computer Circuitry Group. Makes components and circuits.
- Basic Industries. Makes precision metal parts for computers.

Insilco's interest in Times Fiber Communications, a major producer of cables, was reduced from 75 to 67 percent with the issuance of a million shares of common stock for public sale in 1982. Besides Times Fiber, Insilco has a wide range of other interests, falling roughly into two areas: high technology markets and specialty consumer markets.

The high technology area involves such companies as Stewart Stamping, Computer Circuitry Group, Basic Industries, MRM Industries and Steel Parts and Hawthorne. Specialty Consumer Products groups include Miles Homes, a building materials supplier; Nationwide Homes, a manufacturer of prefabricated housing; Enterprise, Sinclair and Red Devil paint companies; Taylor Publishing, a publisher of yearbooks and other specialty items; and Rolodex, which manufactures desk-top rotary index files. The International Silver Co., which was the core company Insilco was built around, was sold in the third quarter of 1982.

During 1982, Times Fiber completed the initial development work and began commercial production of a fiberoptic television distribution system called the Mini-Hub system. Mini-Hub utilizes fiberoptic cables connected to an electronic switching network located on residential streets. Insilco began shipping the system in the middle of 1982.

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– Jeffrey S. Deckman, President, Systems Oriented, Cable Contractor, Cumberland, RI

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Insilco sales rose only slightly in 1982, up 2 percent from $624.7 million in 1981 to $636 million in 1982. Net income, however, plunged 56 percent in 1982, to $14.8 million, down from 1981's $34 million. Insilco's Times Fiber did considerably better, with income down just 7 percent, from $27.7 million in 1981 to $25.6 million last year on revenues of $220.6 million, an 11.4 percent increase over 1981 revenues of $198.1 million.

Knight-Ridder Newspapers Inc.

One Herald Plaza
Miami, Fla. 33101
Alvah Chapman Jr., chairman
James Batten, president

Cable interests:
- TKR Cable Company.-Joint venture with TCI. Systems in New Jersey and New York. 91,000 subs.
- Joint venture with Times Mirror to rebuild Long Beach, Calif., system. 16,000 subs.
- Clear Television Cable Corp. 10 percent interest acquired by TKR from TCI.
- Viewdata Corp. of America (Viewtron). Joint venture with AT&T to launch major consumer videotex service.

Communication interests:
- 31 daily newspapers, including *Philadelphia Inquirer, Detroit Free Press* and *Miami Herald.*
- 11 suburban papers.
- Five television stations.
- Commodity News Service. Distributes news and financial quotes. Expansion to electronic mail planned. 16,000 subs.
- *Journal of Commerce.*
- Vu/Text Information Services. Electronic library systems in Philadelphia, Detroit and Miami.
- HP Books. Publishers of "how-to" books.
- Newsprint mills.
- Cellular radio licenses applied for in Miami.

As a major newspaper syndicate, Knight-Ridder has been pushing its way slowly into the cable industry through a variety of joint ventures. In February 1982, Knight-Ridder and TCI, through their 50-50 venture TKR Cable, acquired 42,000 basic subscribers in Warren and Parlin, N.J., subsequently adding three more New Jersey communities with 45,000 additional subscribers. TKR also bought TCI's 10 percent interest in Clear Television Cable Corp., operating in Toms River, N.J. All told, TKR spent $86.3 million for acquisitions during 1982.

Another venture, this time with Times Mirror, netted Knight-Ridder a 15-year franchise to Long Beach, Calif. At the end of 1982, the system had 16,000 basic subscribers. The company predicts having at least 40,000 basic subs and revenues of over $9 million by year's end. Cost of constructing the new Long Beach system is estimated at $32 million by the company. Knight-Ridder, through TKR Cable, also expects to pay $24 million for TCI's system in Rockland County, N.Y. The system has about 20,000 basic subscribers and passes 49,000 homes. It is expected to pass to TKR's hands this year.

On the technology side, Knight-Ridder and AT&T are planning to launch a test of their Viewtron videotex system in Coral Gables, Fla., this year, and has opened up advertising sales offices in New York and Chicago. Knight-Ridder also is expanding its Vu Text Information Services electronic library system to two new cities, Detroit and Miami, after its debut in Philadelphia. Knight-Ridder spent $5.4 million to acquire Commodity Perspective, whose subscriber base of 8,000 doubled that of Knight-Ridder's Commodity News Services Inc.

Knight-Ridder's revenues were $936 million in 1982, a 4.3

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percent gain over 1981 revenues of $897.4 million. Earnings were up as well, a slight 2.6 percent, from $100.3 million to $102.9 million. Additional operations of Knight-Ridder include 31 daily and 11 suburban newspapers, five television stations, the *Journal of Commerce*, HP Books and various paper mills.

M/A-COM Inc.

South Avenue
Burlington, Mass. 01803
(617) 272-9600
Dr. Lawrence Gould, chairman
Richard DiBona, president

Cable interests:
- M/A-COM Cable Home Communications. Consists of three companies: M/A-COM Comm/Scope Inc., manufactures and markets CATV coaxial cable; M/A-COM Prodelin Inc., manufactures satellite earth station antennas; and M/A-COM Video Satellite Inc., manufactures TV receive-only earth stations and associated electronic equipment.
- Nineteen other companies manufacture components and products for CATV systems users.

Communication interests:
- Valtec. Joint venture with Philips Optical Communications to manufacture optical fiber cable for the telephone and defense markets.
- M/A-COM Components Group. 12 companies manufacturing microwave components for defense and commercial applications.
- M/A-COM Integrated Digital Communications Group. Six companies supplying digital information processing equipment for satellite and terrestrial communications; local digital distribution equipment and other communications equipment for defense, commercial and CATV industries.
- M/A-COM Development Corp. Long-range research and development.

M/A-COM Inc., through its 22 companies grouped into four major divisions, along with its two joint ventures, provides equipment and systems for the commercial telecommunications and defense industries. A major supplier of coaxial cable, satellite earth stations and associated electronic equipment such as receivers, amplifiers and converters, M/A-COM's Cable Home Communications companies accounted for $193.4 million in revenues in 1982, a 7.2 percent increase over 1981's $180.4 million and 32 percent of the company's total revenues for the year, which were $587.6 million in 1982, a 17.9 percent gain over total company revenues of $498.4 million in 1981.

Three companies go into M/A-COM's Cable Home Division. M/A-COM Comm/Scope Inc. is a major manufacturer and marketer of coaxial cable; M/A-COM Prodelin Inc. supplies earth stations and microwave antennas; and M/A-COM Video Satellite Inc. manufactures earth stations and associated equipment. Although M/A-COM's cable division has traditionally had strong growth, 1982 was a slow year, with sales 7 percent above last year and profits down 23 percent. M/A-COM attributes that to a plateauing out of cable installation due to an overextension of resources on the part of MSOs. However, the company sees sanguine market opportunities in the installation of large city markets and the upgrading and expansion of older systems.

Several other M/A-COM divisions also produce and supply equipment used by the cable industry. M/A-COM's joint venture with Philips Optical manufactures optical fiber cable that, though used in the telephone and defense industries, has CATV applications as well. The company's Linkabit Inc. has developed digital and encryption communication equipment for satellite carriers that has been adapted for CATV use in scrambling programs. M/A-COM also has been busy with long-range research and development, increasing R&D expenditures 56 percent in 1982, from $14.7 million in 1981 to $22.9 million. One development in the marketing stage is the Infobus broadband cable network, which simultaneously supports voice, video and data transmissions.

MCA Inc.

100 Universal City Plaza
Universal City, Calif. 91608
(213) 985-4321
Lew Wasserman, chairman
Sidney Sheinberg, president

Cable interests:
- Owns one-third of USA Network.
- Owns 22.58 percent of Showtime and The Movie Channel in a joint venture with American Express, Paramount, Viacom and Warner Brothers.
- Universal Pay Television division. Licenses films and specials to the cable industry.

Communication interests:
- MCA TV Enterprises
- MCA Publishing Rights.
- MCA-TV.
- MCA Merchandising.
- MCA Development.
- MCA Recreation Services.
- MCA Records.
- MCA Videodisc.

MCA entered the cable field in 1980 by purchasing a one-third interest in USA Network, which is now owned by three partners: MCA, Paramount (Gulf+Western) and Time Inc. MCA joined a field of companies—American Express, Paramount, Viacom and Warner Bros.—in announcing the joint operation of both the Showtime and The Movie Channel pay TV services. MCA's share will be 22.58 percent, provided the Antitrust Division of the Department of Justice approves the transaction.

As a leading producer and distributer of motion pictures, through its Universal Studios subsidiary, MCA has become involved in licensing movies from its catalogue to cable. MCA licensed 50 additional films to cable systems in 1982, and in 1983 it broke tradition by being the first studio to premiere a major motion picture on pay-per-view television the same day it opened in theaters.

Other MCA subsidiaries include Universal Theatrical Motion Pictures, Universal Television, MCA TV, MCA Records, MCA Music, a retail and mail-order division, and MCA Recreational Services, which handles visitor concessions at Yosemite National Park and at the Federal Mall in Washington. MCA also is involved in publishing enterprises and in licensing products from its numerous films.

MCA reported the highest revenues in its history in 1982: $1.58 billion as opposed to $1.32 billion for 1981. Income for 1982 was nearly double that of 1981: $176 million as opposed to $89 million.

Multimedia Inc.

P.O. Box 1688
Greenville, S.C. 29602
(803) 298-4373
Wilson Wearn, chairman
Walter Bartlett, president

Cable interests:
- Systems in Kansas, Illinois, North Carolina and Oklahoma (201,246 subs).
- Multimedia Cable Security Services.
- Tar River Communications (60 percent).
- Aequired group of four cable TV systems from ATC near Oklahoma City in exchange for three Tar River systems in North Carolina, plus $22.5 million.

Communication interests:
- 13 daily newspapers.
- 21 non-daily papers.

(Continued on page 191.)

(Continued from page 164.)

- Five television stations.
- Six AM stations, six FM stations.
- Multimedia Program Productions. Produces series for broadcast television.
- Joint venture to apply for cellular radio licenses in five cities with Standwood Corp.

With 201,246 subscribers in Kansas, Illinois, North Carolina and Oklahoma, Multimedia Cablevision is the 26th largest MSO in the nation. In 1982, cable operations brought in $32.8 million in revenues, a 69 percent improvement over 1981's $19.4 million in revenues.

Multimedia Cablevision has been making efforts to expand its cable operations, adding 30 franchises last year, to give it a total of 90 franchises in the four-state area it serves. In keeping with an agreement made in January 1981, Multimedia Cablevision bought another 20 percent of Tar River Communications, giving Multimedia a controlling 60 percent interest in the company. Tar River has 37 systems, with 51,000 basic subscribers and 31,000 pay subscribers. In 1982, Multimedia traded three of those Tar River systems to ATC, along with $22.5 million to sweeten the pot, in exchange for four cable systems near Oklahoma City.

Also this year, Multimedia began to offer its subscribers in Wichita, Kan., home protection through the newly formed Multimedia Cable Security Services. Multimedia believes that cable home security is a growth field for the future, and plans to make it available wherever it has cable franchises.

Aside from cable operations, Multimedia also publishes 34 newspapers and owns five television stations and 12 radio stations. It also produces and syndicates television programming, including *The Phil Donahue Show*.

As a whole, the company earned $225.4 million in revenues in 1982, a 15.5 percent improvement over 1981's $195.2 million. Profits rose 12.2 percent, from $25.8 million in 1981 to $28.9 million in 1982.

The New York Times Co.

229 W. 43rd St.
New York, N.Y. 10036
Arthur Ochs Sulzberger, chairman
Walter Mattson, president

Cable interests:
- New York Times Cable. A single system in Southern New Jersey; 98,500 subs.
- New York Times Productions. Produces original programming for cable television.

Communication interests:
- 16 weekly and 14 daily newspapers.
- Three magazines: *Family Circle, Golf Digest* and *Tennis*.
- Three television stations.
- Two radio stations.
- Mead Data Central. Exclusive rights to distribute NYT data base.
- Times Books.
- The New York Times News Service.
- Four paper mills.
- *International Herald Tribune* (33 percent interest).

The New York Times Co. may be crowing about the two Pulitzer Prizes gained this year by its 132-year-old flagship newspaper, but it is no doubt equally as happy about some of the company's other acquisitions in 1982.

The New York Times Co. added 12 newspapers—nine dailies and three weeklies—to its roster, giving it a total of 30 newspapers. The new dailies have a combined circulation of about 200,000, and the weeklies have a circulation of about 24,000. Aside from newspapers, the company owns *Family Circle, Golf Digest* and *Tennis* magazines, a news service, a features syndicate, a microfilm publishing company, a book publishing firm and shared interest in several Canadian logging firms and the *International Herald Tribune*, not to mention its cable and broadcast operations.

The company's broadcast/cable division exhibited solid growth in 1982, with revenues increasing almost 28 percent, from $36.7 million in 1981 to $46.9 million in 1982. Income was down, however, from $3.5 million in 1981 to $2.7 million last year, the company attributing the decline to increased development costs for their cable system. NYT Cable is the name given to the company purchased in March 1981 from Irving Kahn. The system has grown 37 percent since then, to nearly 100,000 subscribers by the end of 1982. The system has 36 basic channels and serves a three-county area in Southern New Jersey. The system is ranked 9th out of the top 100 systems.

In 1982, total corporate revenues grew 10.9 percent, from $841.7 million in 1981 to $933.6 million in 1982. Income was up 8.6 percent, from 49.9 million in 1981 to $54.2 million in 1982. The addition of 12 new newspapers helps boost company assets some 28 percent in 1982, from $598.8 million in 1981 to $761.4 million last year.

North American Philips Corp.

100 E. 42nd St.
New York, N.Y. 10017
(212) 697-3600
Pieter Vink, chairman
Cees Bruynes, president

Cable interests:
- Magnavox CATV Systems. Manufactures converter/descramblers, headend signal processing equipment, other CATV system products.
- N.A.P. Consumer Electronics Corp. Integration of Philco, Sylvania and Magnavox lines. Manufactures amplifiers and distribution equipment for cable television.

Communication interests:
- Odyssey video games.
- SMATV installation.
- Philips Business Systems.
- North American Philips Research. Developing new technology in digital electronics using VLSI circuits for television.
- Manufactures home entertainment products, video cassettes, color television receivers, projection TV, videodiscs.

North American Philips produces a huge amount of electrical and electronic goods, including color and projection televisions, audio equipment, appliances, video games, cassette recorders and disc players, medical diagnostic equipment, electronic instrumentation for energy, chemical and environmental analysis, musical instruments and magnetic wire. A small segment of Philips' activity is involved in supplying the cable industry with modular amplifiers and distribution equipment for monitoring system performance through its Magnavox CATV Systems division, which itself is grouped in the company's professional equipment branch.

Net sales for Philips were $3.16 billion in 1982, a 4.6 percent increase over 1981's $3.03 billion, but nothing like the 40 percent leap in revenues seen in 1981. During the same period, net income dropped nearly 30 percent, from $103 million in 1981 to $73 million in 1982. Total assets declined slightly, from $1.85 billion in 1981 to $1.82 billion in 1982. A new asset acquired in February 1983 is the Westinghouse lamp business, consisting of 10 plants in the United States and one in Mexico, which Philips purchased for an estimated $175 million.

The Hartford National Bank and Trust, which owns 61 percent of Philips' stock, acts as a trustee for the shareholders of Philips of the Netherlands.

Oak Industries Inc.

16935 W. Bernardo Dr.
Rancho Bernardo, Calif. 92127
(714) 485-9880
Everitt Carter, chairman
Raymond Peirce, president

Cable interests:
- Oak Communications. Produces converters, both addressable and non-addressable converter/decoders, software packages for management of addressable cable and STV systems.
- Oak Media Development Corp. A joint venture with Universal Pictures to produce movies for theaters and pay television.
- Oak Technology. Manufactures electronic components, switches, quartz crystal products, resistors, appliance components and laminating materials.
- Racal-Oak. A joint venture with Racal Electronics of Great Britain to investigate potential involvement in European pay television.

Communication interests:
- STV operations in five cities.
- Telestar Corp. and Oak Media—joint venture to market Oak's ON TV via satellite to SMATV and MDS pay TV outlets nationwide.
- Videonet. Acquired in 1981, provides videoconference services.
- Satellite Systems Unit. Manufactures Orion system for encryption of satellite signals, plus encoding and decoding equipment.
- McCoy Electronics. Produces quartz crystals for military communications.

A major producer of cable and STV electronic equipment, Oak Industries sold its two CATV systems in California in 1982 and announced that it is no longer interested in acquiring any additional cable systems. The company is planning, however, to expand its STV system, ON TV, into several more large metropolitan markets, even though two of its operations (in Dallas and Phoenix) went under, resulting in a loss of $10 million. Oak reports that, while the number of new subscribers signing up for ON TV has been satisfactory, the rate of cancellations and terminations has risen sharply, resulting in an eroding of the subscriber base.

Plans to expand ON TV include utilizing satellite broadcasting. ON TV now is being marketed nationally to SMATV systems and MDS systems through a joint venture with the Telestar Corp. Oak is leasing two transponders from Telestar on the Comstar D-4 satellite, and already has commitments for 16,000 new subscribers through the venture.

Oak Media Development also is involved in a joint venture with Universal Pictures to produce movies for theatrical and cable release, the first collaboration between a major studio and a pay TV system operator. The first production of the $16 million, four-picture agreement between Oak and Universal already has been completed and should be released to theaters and then to cable systems soon.

Another joint venture involves Oak with Racal Electronics of Great Britain. The two companies are exploring profit opportunities in European pay television, with Oak contributing technology from its Oak Communications division in the form of converter/decoders and computer-directed software programs.

Oak also operates VideoNet, a producer of teleconference services and programming in which Oak acquired 81 percent equity in 1981.

Besides communications activities, Oak is a manufacturer of electronic components, including switches, quartz crystal products, resistors, appliance components, converter/decoders and laminating materials for industrial needs.

Oak's revenues rose in 1982, from $507.1 million the previous year to $545.7 million. But income fell dramatically, down 86.5 percent, from $30.3 million in 1981 to $4.1 million in 1982. Oak attributed this slashing of income in 1982 to "the recession, less-than-expected growth in the cable television industry, production start-up problems with new cable TV decoders and devaluations of the Mexican peso."

The Penn Central Corp.

245 Park Ave.
New York, N.Y. 10167
(212) 599-8000
Alfred Martinelli, president and CEO
Charles Cobb, chief operating officer

Cable interests:
- General Cable Co. Manufactures products and supplies for the cable industry.
- General Cable International.

Communication interests:
- Sprague Electric Co.

Long after the last Penn Central locomotive traveled its last mile of track, the 137-year-old company put itself on the electronics and telecommunications track with the purchase of G.K. Technologies Inc. for $704 million in the spring of 1981. Through its General Cable and General Cable International subsidiaries, G.K. Technologies is a manufacturer of wire and cable products for the telecommunications industry.

Since its purchase, Penn Central has invested more than $11 million in cable operations, mostly for a new fiberoptics manufacturing facility and modernization of South American wire and cable manufacturing facilities. In return, Penn Central's cable operations brought in $373.2 million in revenues last year, a 30.2 percent increase over 1981's revenues of $286.6 million. Cable and telecommunications equipment account for an increasing amount of Penn Central's revenues, 11.8 percent in 1982 as opposed to 8.6 percent in 1981.

In an effort to divest itself of all holdings unrelated to electronics, telecommunications, energy or natural resources, Penn Central sold its amusement park subsidiary to Bally in early 1982 for approximately $147 million. It also sold a 27 percent share in Phillips Cables Ltd., a Canadian wire and cable manufacturer, for approximately $23.8 million in cash. Total Penn Central revenues for 1982 were $3.16 billion, a reduction of some 5.5 percent from 1981 revenues of $3.34 billion. Income dropped from $168 million in 1981 to $131 million in 1982, a reduction of 22.1 percent.

Besides wire and cable products, General Cable's Apparatus Division produces aerial lift trucks used in installing and servicing communications and CATV wire and cable, along with other installation service products.

Penn Central has gotten involved in a wide variety of concerns since leaving the railroad business. It manufactures offshore oil rig equipment and machinery, operates petroleum pipelines, produces electronic and electrical circuit components for the aerospace and military industries, has numerous real estate and resort concerns, including Madison Square Garden, which it owns and manages, and it also provides paving and utility construction services and manufactures various household products.

Playboy Enterprises Inc.

919 N. Michigan Ave.
Chicago, Ill. 60611
(312) 751-8000
Hugh Hefner, chairman
Christie Hefner, president

Cable interests:
- The Playboy Channel—joint venture with Cablevision, Cox Communications and Daniels & Associates.

■ "Electronic version" of *Playboy* magazine, an hour-long video program provided to 600,000 over-the-air subscription homes served by Oak Media Development's ON TV, as well as The Playboy Channel.

Communication interests:
■ Magazine publishing: *Playboy*, *Games*, guides, foreign editions.
■ Playboy Productions—television, home video, pay cable production.

Despite consolidation in several areas, Playboy Enterprises has pushed forward in both cable and over-the-air pay television. It began to produce original Playboy programming for Rainbow Programming Services' Escapade channel (renamed The Playboy Channel in late 1982) in a joint venture with Cablevision Program Enterprises, Cox Cable and Daniels & Associates. Launched with a subscriber base of 200,000 homes, the channel was expected to reach 400,000 homes by the first quarter of 1983. Playboy also began a one-year agreement with Oak Media Development Corp. to provide 12 once-a-month, hour-long video *Playboy* magazine programs for its over-the-air service. Playboy has contracted with CBS/20th Century-Fox for exclusive worldwide distribution of Playboy-produced programming on home videocassettes and discs.

In what was termed "a key transitional year," Playboy reported a net loss of $51.7 million for 1982, mostly due to the company's forced divestiture of its Atlantic City and British casino operations. Playboy's book publishing operations were also sold, but Playboy will continue to publish certain Playboy-denominated book material.

Playboy magazine remained the company's major source of income, generating $136 million of the firm's $210 million total 1982 revenues. Magazine revenues were up 2.3 percent over last year.

A rapidly growing area is sales and licensing of Playboy products, such as those featuring the Playboy insignia. Revenues for this group increased $1.4 million, or 24.2, with earnings going up 9.1 percent in 1982.

In addition to *Playboy* magazine in the U.S. and eight foreign editions, Playboy also publishes *Games* magazine, whose circulation has increased 500 percent—to 150,000 copies per issue—since the company purchased the magazine in 1978. Playboy also has continued to operate a chain of hotels and clubs, with two new franchises expected to open this year, and a key holder base of 800,000.

Pioneer Electronic Corp.

1925 E. Dominguez St.
Long Beach, Calif. 90810
(213) 639-5050
Nozomu Matsumoto, chairman
Seiyz Matsumoto, president

Cable interests:
■ Manufactures QUBE and QUBE III for Warner Amex Cable.
■ Manufactures system-related technology.

Communication interests:
■ Home and auto audio products.
■ Television and LaserDisc equipment.

After suffering through what the company terms a "very severe business climate in fiscal 1982," Pioneer is keeping an optimistic eye on Warner Amex's expansion of its QUBE interactive cable television system, which is supplied to Warner

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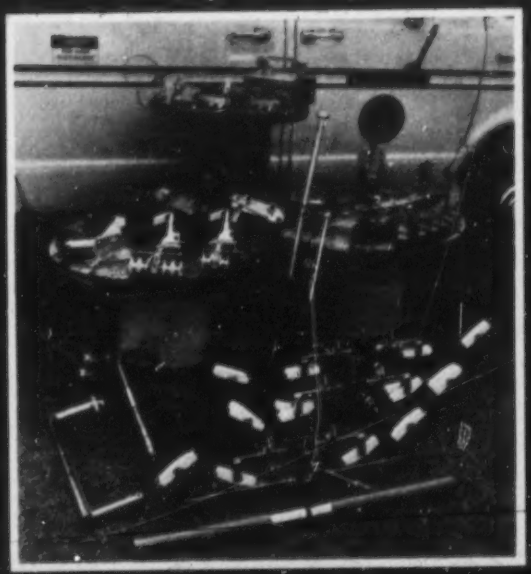

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Amex by Pioneer. QUBE systems are either presently operating or planned for the near future in Columbus, Ohio, Cincinnati, Pittsburgh, Houston, Dallas and portions of St. Louis and Chicago. With the second-generation QUBE III offering a 110-channel capacity that can be used for home security, home shopping and information retrieval, Pioneer anticipates its QUBE productions to increase dramatically in the next several years.

Pioneer also announced plans to enter the one-way addressable cable field in the U.S. soon, in an attempt to reach other cable markets besides QUBE, and also is working on developing a new interactive system which, using digital transmission technology, will allow subscribers to exchange information among themselves.

In addition to cable, Pioneer also is vigorously promoting its LaserDisc players and discs, which have to compete in a tight market against VCR units. In March 1982, Pioneer acquired all the shares of the Tokyo-based Universal Pioneer Corp., which up to then had been manufacturing LaserDisc products as a joint venture.

Pioneer's major product concern remains home audio prbducts, however, with its several lines of stereo components accounting for nearly 50 percent of the firm's total revenues in 1982. Total net sales for Pioneer were $1.12 billion in 1982, a slight drop from last year's $1.19 billion. Income dropped considerably, from a profit of $54.1 million in 1981 to a loss of $11.5 million in 1982. While the dollar figures represent a certain amount of fluctuation in the dollar/yen exchange rate for the Japan-based firm, it was unquestionably not one of Pioneer's better years. But the company remains optimistic that, with a better economy, its state-of-the-art product lines—such as the new miniature portable stereo systems—and its stake in the growing cable field, will see it through to better days.

RCA Corp.

30 Rockefeller Plaza
New York, N.Y. 10020
(212) 621-6000
Thorton Bradshaw, chairman
Robert Frederick, president

Cable interests:
- Commercial Products and Services division. Manufactures commercial video equipment for cable television.

Communication interests:
- Five television stations.
- Eight radio stations: four AM, four FM.
- RCA Network Services. Electronic messenger service.
- RCA Communications Inc. Encompasses RCA Americom, domestic satellite services; RCA Globcom, international satellite services; and RCA Cylix Communications Network, value-added data communications.
- NBC Radio Network.
- NBC Television Network.
- Consumer Products and Services division. Manufactures TV receivers, VCRs, videodisc players and discs, records and recorded tapes.

After less than a year in the programming side of cable, RCA discontinued The Entertainment Channel, in which it had a 50 percent interest, citing operating losses during its nine months of service as the cause. RCA's remaining interest in cable lies as a supplier of commercial video equipment, such as studio cameras and monitors and satellite communications equipment and services. Its RCA Cablevision Systems also provides installation services for the cable industry.

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Decatur, AL 35603
(205) 355-8577

RCA turned around a four-year decline in earnings in 1982. Revenues were up only 2.9 percent, from $8 billion in 1981 to $8.23 billion last year, but income jumped 312.2 percent, from $54 million in 1981 to over $222 million last year. RCA continues to hunt around for a buyer for its Hertz and Coronet divisions, in an effort to dispose of most of its non-electronic concerns except for the C.I.T. Financial Corp., which has been a consistent profit center since its acquisition in 1980.

RCA's extensive holdings include the NBC television and radio networks, with five NBC-owned television stations and over 200 affiliates, plus eight radio stations and over 350 affiliates. In addition, RCA owns the Satcom satellite system, whose transponders are used to deliver programming signals to cable systems' earth stations. RCA also has considerable research and development operations, part of which are working on improved methods of teletext transmission using a portion of TV broadcast signals, and is involved in developing defense technology.

Rogers Cablesystems Inc.

Suite 2602, Box 249 Commercial Union Tower
Toronto, Canada M5K 1J5
(416) 864-2373
Edward Rogers, chief executive officer
George Fierheller, president

Cable interests:
- Canadian Cablesystems Ltd. Owns 15 systems in Canada serving 1.2 million subscribers.
- Rogers Cable TV Ltd. Owns Canadian systems serving 756,000 subscribers.
- Rogers U.S. Cablesystems Inc.
- Rogers UA Cablesystems Inc. (51 percent); joint venture with United Artists Communications. Ranked 8 in top 100 MSOs; 733,225 subs.
- Cableshare (37 percent). Data processing service.

The largest MSO in Canada, Rogers Cablesystems took a great stride in securing a solid foothold in this country when it wrapped up its acquisition of a controlling interest in UA-Columbia Cablevision Inc. in November 1981 after a bitter battle.

The acquisition added a potential of over one million homes located in San Antonio, Texas; parts of Westchester County and Long Island, N.Y.; parts of Northern New Jersey; and several areas in the Southern and Central United States. Combined with Rogers' other U.S. subsidiary, Rogers U.S. Cablesystems Inc., UA-Columbia Cablevision, renamed Rogers UA Cablesystems, now have a combined potential of 1.7 million homes.

As it stands now, however, Rogers Cablesystems and United Artists Communications will split up the Rogers UA partnership. The partnership, which now accounts for approximately 733,225 basic subscribers, will be split roughly in half with UA-Columbia Cablevision reverting back to an independent MSO.

Rogers' revenues for 1982 were $244.3 million, a 122.9 percent increase over 1981's $109.6 million. The company operated at a $10.5 million loss in 1982, however, as opposed to 1981's profit of $2.2 million. A great deal of responsibility for this turnaround is no doubt due to the $185 million Rogers spent to acquire UA-Columbia Cablevision, $162.9 million of which was spent during fiscal 1982.

During 1982, Rogers UA Cablesystems disposed of its 50 percent interest in the USA Network cable satellite service, selling it to Time Inc. for $15 million in cash. Rogers UA also invested a record $64 million in capital improvements, mostly to its San Antonio, New Jersey and Westchester County systems.

Rollins Inc.

2170 Piedmont Rd. N.E.
Atlanta, Ga. 30324
(404) 873-2355
O. Wayne Rollins, chairman
R. Randall Rollins, president

Cable interests:
- Rollins Cable Vue Inc. Owns 80 percent of Massachusetts systems, 88 percent of Connecticut systems, 100 percent Delaware and Rhode Island systems. Total subs: 137,300.

Communication interests:
- Three VHF stations.
- One FM and five AM stations.
- Outdoor advertising facilities.

Rollins Cable Vue is a part of Rollins' Media Group, which consists of cable operations, outdoor advertising facilities in the Northeast and Southwest, three VHF television stations, and one FM and five AM radion stations. Rollins expanded its cable operations in 1982, and now reaches 137,300 subscribers in 25 communities in Delaware, Connecticut, Massachusetts and Rhode Island. The company has filed for additional cable franchises in both Massachusetts and Rhode Island and is investigating acquiring still more systems. The media group increased revenues in 1982, with cable operations contributing $69.2 million. The group had a 10 percent rise in income, despite heavy start-up costs for the construction of newly awarded cable franchises.

Besides its media holdings, Rollins also owns the Orkin Exterminating Co., the largest termite and pest control firm in the world; Patterson Services, an equipment supplier for oil and gas exploration and drilling; and Rollins Protective Services, the largest home security firm in the United States. Total revenues for Rollins were $526.4 million in 1982, a 15.8 percent improvement over 1981's $454.6 million. Income was up 3.6 percent, from $44.4 million in 1981 to $46 million in 1982.

Sammons Enterprises

P.O. Box 225235
Dallas, Texas 75265
(214) 670-9790
Charles Sammons, chairman of the board
James Whitson, president

Cable interests:
- Sammons Communications—536,447 subscribers, ranked 13 in top 100 MSOs (3/83).
- Sammons Production—produces sports programming for Sammons' systems.

Total revenue for Sammons Enterprises was not available at press time, but cable revenues for the Sammons Communications division jumped 25.6 percent in 1982, totaling $78.6 million as compared to the previous year's $62.6 million. Operating income for the cable division increased 36.1 percent to $18.04 million, and identifiable assets climbed 34.3 percent to $142.6 million, as compared to last year's $106.1 million.

From its corporate headquarters in Dallas, Sammons Communications is franchised in more than 160 cities and operates 45 cable TV systems in 20 states. Having been a pioneer in the cable television industry for more than 15 years, SCI serves more than 330,000 customers and counts more than 60 percent of homes in its franchise areas as subscribers, one of the highest percentages of penetration in the industry.

SCI attributes its achievements to its financial strength, experience, capabilities and forward-looking commitment to customers and the industry. SCI has operating earth stations in 15 of its systems and ultimately plans to install similar stations in most of its systems.

The cable division is one of four. The other three include a distributing outlet for imported dinnerware, as well as for oil supplies and products, hotel and resort operations and an insurance business. The cable business has been an important contributor to the financial picture, but is not Sammons' biggest division.

Scientific-Atlanta Inc.

One Technology Pky., Box 105600
Atlanta, Ga. 30348
Sidney Topol, chairman
Jack Kelly Jr., executive vice president

Cable interests:
■ Manufactures satellite earth stations, produces and distributes satellite communications products for all segments of the field. Equipment manufactured includes: antennas, coaxial cable, subscriber home products, earth stations, instrumentation equipment.

Scientific-Atlanta realized $337.2 million in sales for fiscal 1982, a 22 percent gain over 1981. Earnings, however, dropped 26 percent, down to $14.2 million. A major factor behind this decline in income was Scientific-Atlanta's phasing out of a major product—their cable TV set-top terminal—and its replacement with a redesigned, 128-channel addressable terminal. The company signed an agreement with Matsushita Electronic Components of Japan to manufacture the new set-top terminal, in an effort to bring the unit to the market quickly with a minimum of capital investment.

As a leading manufacturer of headends and antennas in the United States, Scientific-Atlanta reported record sales increases for their satellite and instrumentation product lines, and introduced a new digital audio earth station that the company says has been adopted and ordered by the major U.S. radio networks.

In recent years, Scientific-Atlanta has been broadening its equipment line, most notably with the acquisition in 1980 of Systems Communication Cable, a manufacturer of coaxial cable.

Pointing to a "deep recession" throughout the Western Hemisphere, Scientific-Atlanta reported a significant canceling of backlog orders from cable operators delaying construction of new systems. But the company also feels that satellite equipment will always be crucial to the cable industry, which it sees as expanding to include home security, energy management, electronic banking, newspaper and information retrieval, along with educational services.

Scripps-Howard Broadcasting

1100 Central Trust Tower
Cincinnati, Ohio 45202
Jack Howard, chairman
Donald Perris, president

Cable interests:
■ Scripps-Howard Cable Services Co. Owns and operates systems in Lake County, Fla. (20,000 subs); Colorado (Longmont system under construction, agreement in principle to acquire Storer Communications' systems in five other communities, for a total of approximately 20,000 subs upon completion of acquisition and construction); and Tulare County, Calif. Scripps-Howard also owns a 50 percent share of several Connecticut systems: in Bridgeport (owned with Charles Dolan, 55,000 subs upon completion); in lower Fairfield County (also owned with Charles Dolan, 65,000 subs upon completion) and are negotiating for several smaller systems in the area with a total of 43,000 subs. The company also has holdings in Ann Arbor, Mich., which it shares with Daniels & Associates.
■ Participation in ABC/Westinghouse's SNC by supplying local news.

Communication interests:
■ Three AM radio stations.
■ Four FM radio stations.
■ Six television stations.

Despite its long-time involvement in broadcast television and radio, Scripps-Howard is eager to diversify into cable, and expects to spend at least $23.4 million this year in cable systems. Within the past two years, Scripps-Howard has added wholly owned systems in Florida, Colorado and California, and partially owned systems in Connecticut and Michigan, to its six television and four radio stations.

Scripps also is involved in cable through another route, supplying cable operators with local news programs. For example, *The Rocky Mountain News*, a newspaper owned by Scripps-Howard's parent company, E.W. Scripps, is pursuing a joint venture with Mile High Cablevision in Denver to offer local news via cable. E.W. Scripps bought a limited partnership interest in Mile High from Daniels & Associates in April.

Cable revenues more than doubled for Scripps-Howard in 1982, up to $5.3 million from 1981's $2.2 million. Overall revenues stood at $95.6 million in 1982, a 9.5 percent improvement over 1981 revenues of $87.3 million. Net income was almost unchanged, up 2 percent, from $19.2 million in 1981 to $19.47 milion in 1982. Income was negatively affected by heavy start-up costs for new cable systems, and bolstered by the one-time gain from the sale of one of Scripps-Howards' AM radio stations, WNOX.

Storer Communications

12000 Biscayne Blvd.
P.O. Box 61-8000
Miami, Fla. 33161-8000
(305) 899-1000
Peter Storer, chairman of the board
Terry Lee, president

Cable interests:
■ Storer Cable Communications. Ranked 6th in top 100 MSOs; 1.2 million subscribers in 117 systems.
■ Spotlight. Joint venture pay cable service.

Communication interests:
■ Five VHF television stations.
■ Two UHF television stations.
■ WLAK-FM, Chicago, sold for $8,000,000 (3/82).

Storer Communications' cable division, Storer Cable Communications, continued its strong growth pattern during 1982, with revenues soaring 67.7 percent to $222.65 million, and operating income jumping 64 percent to $61.37 million. During last year, 317,000 basic subscribers were added, pushing the company past the 1 million subscriber milestone for the first time. Total plant miles added during the year were 8,950, which increased total active miles of cable plant at year end to 31,150.

An important development for the company was the completion of the nation's first computerized fiberoptic cable TV system. The system, located in Park Place, the 1,028-unit condominium development in Pembroke Pines, Fla., has been fully operational since August.

During 1982, Storer maintained emphasis on completing and marketing systems activated and acquired in the last two years. While franchising was not emphasized as heavily in 1982 as in previous years, the company successfully concluded the franchise award for the city of Minneapolis after several years of protracted litigation.

Now that the franchises Storer has won and intends to construct have become clear, it is moving to consolidate some of the more isolated stand-alone systems into clusters that give operational efficiency. During the year Storer was able to conclude the trade of its Glendale Heights, Ill., system for a system serving the city of Newport, Ky., which is contiguous to its system serving Campbell County, Ky. The company intends to seek opportunities along the same lines in 1983.

Storer felt the impact of the economy during 1982, with some slowdown in sales of basic cable television subscriptions. However, the company compensated for the slowdown through its ability to sell and retain multi-premium units to subscribers. Along with Times Mirror, Cox, TCI and Cablevision Systems, Storer is a part owner of Spotlight, the pay TV programming service available to the MSO's affiliated systems.

Taft Broadcasting Co.

1718 Young St.
Cincinnati, Ohio 45210
(513) 721-1414
Charles Mechem Jr., chairman
Dudley Taft, president

Cable interests:
- TCI-Taft Cablevision. A 50-50 joint venture to acquire systems and create programming (88,337 subs as of 3/31/83).
- Taft-TCI Programs. A 50-50 joint venture that develops programming. Includes an investment in Black Entertainment Television.

Communication interests:
- Seven television stations.
- 12 radio stations.
- Hanna-Barbera Productions
- Taft Entertainment Co.
- Worldvision Enterprises.
- Four theme amusement parks.
- Titus Productions and Ruby Spears Enterprises.
- Philadelphia Phillies (47.5 percent share.)

In its second year of involvement in cable, Taft continued to acquire systems in New England and Michigan, aided by its partner, Tele-Communications Inc., the largest cable system operator in the United States. The TCI-Taft venture now has about 90,000 subscribers in 32 communities in Connecticut, New Hampshire and Michigan, and it hopes to have 200,000 subscribers by 1984. Taft has invested approximately $83 million to date acquiring cable systems. About half of the TCI-Taft subscribers are served by 12-channel systems, the other half by systems with 20 channels or more.

Taft-TCI also is working to develop programming. In February 1982, Taft-TCI Programs announced plans to acquire an equity interest in Black Entertainment Television. BET is the only cable network to provide totally black-oriented material, and it reaches over 8.9 million homes in 805 markets nationwide. Taft-TCI Programs also has four pilot programs in production, including a children's show set in Taft theme parks and a public affairs show originating from Taft's Washington station, WDCA-TV.

Although Taft began in the 19th century as a newspaper publishing company in Cincinnati, the company has phased out newspaper publishing in favor of electronic media. Today, Taft holdings range from seven television and 12 radio stations to the Taft Entertainment Co. (a production firm), Worldvision Enterprises, amusement parks, motels, campgrounds, travel services and Hanna-Barbara, the animation company that boosted American culture with such creations as the Smurfs and the Flintstones. Taft also is involved in real estate, owns a

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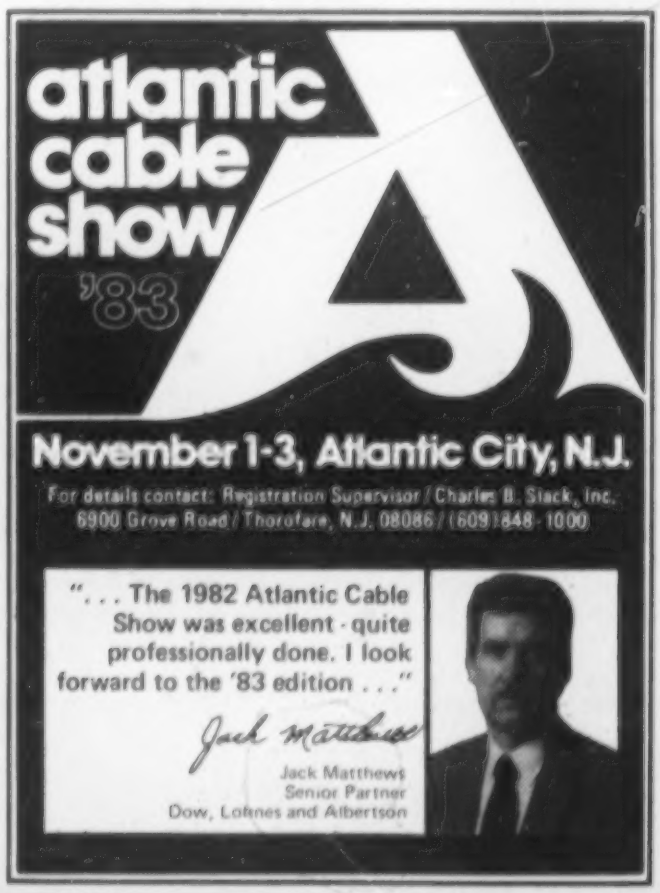
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47.5 percent interest in the Phildelphia Phillies baseball team and has just secured the rights to broadcast Phillies games for the next nine years.

Taft's corporate net revenues were $358.2 million in 1982, a whopping 49 percent jump over 1981's $239.9 million. Profits also surged ahead in what Taft called a "record year," up 60 percent to $38.8 million from a 1981 profit of $24.2 million. Total assets were sluggish by comparison, rising from $579.1 million in 1981 to $611.9 million in 1982, a relatively sparse gain of 6 percent.

Tele-Communications Inc.

Box 22595, Wellshire Station
Denver, Colo. 80222
Bob Magness, chairman
John Malone, president

Cable interests:

- TCI Cable Division. Top ranked MSO in the country. 2,255,000 subs. Systems in 43 states.
- TCI-Taft Cablevision Associates. 50-50 joint venture to acquire systems.
- Taft-TCI Programs. 50-50 joint venture to develop programming. Includes investment in Black Entertainment Television.
- *Cabletime Magazine*. Cable program guide.
- Other joint ventures: Athena Communications Corp. (80.5 percent); Lenfest Communications (20 percent); Memphis CATV (44.5 percent); Illinois Community Cablevision (50 percent); Tennessee-Kentucky Cable TV Co. (50 percent); TKR Cable (50 percent); Spotlight (20 percent); TeleScripps Cable (joint venture with E.W. Scripps Co.).

Communication interests:

- Western Tele-Communications Inc. TCI's microwave division; provides common carrier communication services through terrestrial microwave video relay systems.
- National Telefilm Associates (77 percent). Film distribution company.

The top ranked MSO in the country, Tele-Communications Inc. spent a lot of money in 1982 trying to keep its number one position. It invested almost $100 million acquiring stock or assets of several cable companies, and its efforts seem to be paying off for the company. Total revenues have more than doubled in the past two years, with revenues leaping 55.7 percent in 1982, to $282.5 million, from 1982's $426 million. Heavy capital investment took a toll on earnings, however, which dipped 19 percent, from $12.8 million in 1981 to $10.4 million last year.

TCI announced its energetic exploration of addressability in its systems, and after offering The Disney Channel in April 1983 on an addressable basis to its 2.25 million subscribers, the company plans to switch all its systems over to addressable status, with addressability controlled from Denver.

Some of TCI's more notable joint ventures are: TKR Cable, a company formed on a 50-50 basis with Knight-Ridder in February 1982 and already owning five systems in New York and New Jersey with a base of 91,000 subscribers; TCI-Taft, a venture with Taft Communications designed to acquire systems in Michigan and New England; Taft-TCI Programs, a 50-50 venture to develop and acquire programming, including an investment in Black Entertainment Television; and Spotlight, in which TCI owns a 20 percent share in the jiont venture pay cable service along with Storer, Cox, Cableivison Systems and Times Mirror.

Although over 93 percent of TCI's activities are cable-related, it does have a substantial concern in communication engineering and turnkey construction services through its microwave division, which produces satellite earth stations for use in network television, CATV and phone service.

Time Inc.

Time & Life Building, Rockefeller Center
New York, N.Y. 10020
(212) 586-1212
J. Richard Munro, president
Ralph Davidson, chairman of the board

Cable interests:

- Home Box Office.
- Cinemax.
- American Television and Communications Corp. 2,104,745 subscribers.
- Joint venture with Toshiba Corp. to develop multi-unit addressable decoding device for pay TV.
- HBO and Orion Pictures Corp. $10 million investment to finance programming.
- Nova. HBO, CBS, Columbia Pictures Industries joint venture to form new film studio.
- Teletext experiments in San Diego, Orlando, Fla.
- USA Network (33 percent).
- *TV-Cable Week*.
- HBO and Columbia Pictures—financing agreement for program production.

Communication interests:

- STV. Two stations. Dallas station sold to Golden West STV (9/82).
- WOTV. Last TV station sold to LIN Broadcasting Corp. (1/83).
- Magazine publishing (seven).
- Time-Life Books.
- Book-of-the-Month Club.
- Little, Brown.
- Pioneer Press—29 weekly Chicago publications.

Time Inc.'s video operations continued their accelerated growth in 1982, with ATC now ranked second among the top MSOs. HBO celebrated its 10th anniversary in 1982, and during the year the number of subscribers to the pay service rose to 11.5 million in 4,500 systems located in all 50 states. Cable revenues rose 39.8 percent for 1982 to $864 million, compared to 1981's $618 million. Operating income climbed 35 percent to $166 million, compared to the previous year's $123 million total. Assets were up 25.1 percent to $1.08 billion during 1982, compared to 1981's $863 million.

ATC increased its basic cable television subscribers to 2.1 million during 1982, with pay TV subscribers increasing to 1.9 million. However, ATC withdrew from franchise battles in a number of urban markets rather than submit bids that had little chance of producing an adequate return on investment. Instead, ATC has adopted a cluster strategy that involves acquiring existing cable systems contiguous to its holdings. ATC has agreed to purchase a cable company that passes some 90,000 homes in 12 communities around Rochester, N.Y., a city that ATC already serves.

Late in the year, ATC signed a pact with Toshiba Corp. of Japan to develop a multi-unit addressable decoder for pay TV. The unit is expected to be mounted outside the home and will decrease the danger of equipment theft and tampering, and, being addressable, also will aid cable systems to tailor their basic and pay TV services to the individual customers.

Besides its expansion into cable, the company is also well-known for its line of consumer magazines: flagship *Time*, *Life*, *Sports Illustrated*, *Fortune*, *Money*, *Discover* and *People*, as well as its Time-Life books division.

On the program services front, HBO extended an existing financing agreement with Columbia Pictures Industries to cover films produced by that studio through mid-1986. Under terms of the agreement, HBO will advance a portion of the production cost of each film and pay license fees based on the film's theatrical performance. HBO entered into a similar arrangement with Orion Pictures Corp. during 1982 and also made a $10 million investment in that company. As regards

HBO's pre-buys, among the current films to which HBO will have exclusive pay TV rights are *Tootsie* and *Sophie's Choice*. At the end of the year, HBO joined with CBS and Columbia to form a major new film studio for the production and distribution of theatrical motion pictures. HBO currently has several made-for-pay television movies in production or development, including Elizabeth Taylor and Carol Burnett in *Nobody Makes Me Cry*.

In 1982, HBO developed *Fraggle Rock*, an original children's series featuring Jim Henson's newest group of Muppets, the Fraggles. Early in 1983, HBO launched its first comedy series, *Not Necessarily the News*. For the fourth year in a row, HBO won the largest number of ACE awards and won the first Peabody Award ever given to a pay TV network, for a documentary on women's rights, *She's Nobody's Baby*.

Another highlight for the company was its Cinemax pay service, which was launched in 1980 and increased its subscriber count from 1 million at the beginning of 1982 to 2 million at year's end. Cinemax is currently undergoing format changes from a movie-only service to include original programming to attract a younger audience. USA Network, which Time Inc. purchased a one-third interest in in 1981 (along with Gulf+Western and MCA Inc.), is an advertiser-supported cable service that offers sports, movies, women's programming and children's shows. During 1982, USA's audience base rose from 10 million homes to 15 million and the program day was expanded to a full 24 hours.

By the end of 1982, Time Inc.'s Video Group also had begun teletext market tests in San Diego and Orlando, Fla.

The company as a whole, reported an 8.1 percent increase in total revenues, from $3.29 billion in 1981 to 3.56 billion in 1982. Net income for 1982 increased 2.9 percent to $153 million, from the $148 million reported in 1981.

The Times Mirror Co.

Times Square Square
Los Angeles, Calif. 90053
(800) 421-8603
Otis Chandler, chairman and editor-in-chief
Robert Erburu, president and chief executive officer

Cable interests:
- Times Mirror Cable Television. Approximately 67 systems in 16 states; total subs: 807,348.
- Spotlight. A joint venture pay TV service featuring motion picture and entertainment specials.
- Videotex America. A joint venture with Infomart of Toronto to form partnerships to operate consumer videotex systems in local markets.
- Times Mirror Videotex Services. Completed nine-month videotex experiment in December 1982 and is currently analyzing data for possible future development activities.
- American Cable Television. Times Mirror owns a 50 percent interest in Phoenix and other Western cities.
- Times Mirror Security Communications. Tests two-way cable security systems.

Communication interests:
- Five newspapers.
- Seven television stations.
- Book publishing. Signet, Mentor, Meridan, Abrams College Text.
- Consumer magazines.
- Scientific chart productions.

Originally devoted strictly to print media, The Times Mirror Co. now owns seven television stations and has numerous cable TV operations. Times Mirror Cable Television is the seventh largest MSO in the nation, with 807,348 subscribers in 67 systems. Times Mirror also has a half share of American Cable Television's system in Arizona and other states.

Times Mirror's cable interests earned revenues of $125 million, a 21 percent rise over 1981 revenues of $103 million. Income, however, was down some 14 percent, from $23.2 million in 1981 to slightly over $20 million in 1982. Times Mirror cited high franchise start-up, development and upgrading costs as causing the reduction in income, reporting that operating expenses rose 31 percent in 1982.

Spotlight, the 24-hour-a-day movie services owned by Times Mirror along with Cox, Storer, TCI and Cablevision, served 735,000 subscribers by the end of 1982. In December, Times Mirror Videotex Services completed what it called "the most comprehensive consumer videotex trial yet undertaken in the United States." The nine-month trial provided 350 households with videotex news, information and services from Times Mirror's 70,000-page "Gateway" data package. The test in part studied consumers' willingness to pay for such a service, and the results are being analyzed during 1983 as the basis for future planning for the service.

Times Mirror Videotex Service has formed a joint venture, Videotex America, with Informart of Toronto, itself a joint-venture between Canadian communications companies Torstar and Southam. Videotex America plans to form partnerships to operate consumer videotex systems in local markets. Agreements to study the feasibility of offering videotex services have been signed in San Francisco, Phoenix and Jacksonville, Fla.

In May 1983, *Newsday*, a Time Mirror newspaper in Long Island, introduced a cable "Newsday Channel" to 160,000 households. The channel provides 24-hour news, information and advertising service.

In 1982, Times Mirror divested itself of The Southwestern Co. and its related company, Nashville Educational Marketing Services. It also sold the *Orange Coast Daily Pilot*, one of its smaller newspapers. Times Mirror remains a major publisher, operating *The Denver Post*, the *Dallas Times Herald*, *The Hartford Courant* and two Connecticut newspapers, *The Advocate* and *Greenwich Time*, in addition to its flagship publication, *The Los Angeles Times*. The company produces newsprint, primarily for its own publications, and manufactures and sells lumber and particle-board, its log requirement being supplied by company-owned lumber yards. Times Mirror publishes consumer magazines such as *The Sporting News*, *Popular Science* and *Outdoor Life*. It also owns seven television stations.

Corporate revenues for Times Mirror were $2.21 billion in 1982, a 3 percent improvement over the $2.15 billion reported in 1981.

Tribune Co.

435 N. Michigan Ave.
Chicago, Ill. 60611
(312) 222-3232
Stanton Cook, president
John Madigan, executive vice president

Cable interests:
- Tribune Cable Communications. 133,748 subs, ranked number 36 in top 100 MSOs.
- Joint venture with United Cable Television Corp. for system operation. Has acquired one system in Michigan, negotiating as successful applicaant for two systems in Massachusetts and California.
- News Sketch. Electronic information service delivered to 85,000 households in Orlando, Fla.
- Tribune Company Syndicate. Television program listing service for newspapers and cable systems.

Communication interests:
- Three television stations, including WGN-TV.
- Five radio stations.
- Newspaper publishing.

If the Tribune-owned Chicago Cubs could acquire power hitters as successfully as the Tribune's Cable Communications division has been acquiring cable systems, the pennant couldn't be far off. In 1982, Tribune Cable was awarded cable franchises for Tampa, Fla. (114,000 homes); Lakewood, Calif. (26,000 homes); and Oakland County, Mich., in conjunction with United Cable Television Corp. (105,000 homes). Tribune Cable was the successful applicant in five other areas, two as partners with United Cable, where negotiations still are going on. These five franchises include approximately 600,000 homes.

In addition to the new systems, Tribune Cable had 130,000 subscribers in existing systems at the end of 1982, and estimates that its subscriber growth rate was 25 percent for the year.

Tribune's broadcasting, cable TV and entertainment division, which includes the Tribune's television and radio concerns along with cable, showed a 34 percent increase in revenues this year, from revenues of $154 million in 1981 to revenues of $205 million in 1982. Profit for the division was down 6 percent, however, from $27.1 million in 1981 to $25.4 million in 1982. Broadcasting profits were substantially higher, but were offset by cable losses—due to depreciation and new construction—and losses from the Cubs.

The Tribune Co. had a slow first three quarters of 1982, but surged ahead in the fourth quarter to end up in the black, albeit with an income considerably lower than last year. Total revenues in 1982 were $1.43 billion, a slight 1.8 percent increase over 1981 revenues of $1.4 billion. Income was $23.9 million, a whopping 73 percent less than 1981's $89 million, but better than the $25 million loss Tribune was facing at the end of the third quarter.

Turner Broadcasting System Inc.

1050 Techwood Drive N.W.
Atlanta, Ga. 30318
(404) 989-8500
R.E. Turner, chairman
Peter Dames, president

Cable interests:
- Cable News Network.
- CNN Headline News.
- WTBS.
- CNN Radio.

Communication interests:
- Atlanta Braves.
- Atlanta Hawks (96 percent interest).
- National League of Professional Baseball Clubs, member.
- Turner Advertising Co. (78 percent).

Turner Broadcasting launched CNN Headline News in 1982, to provide the national and international news in constantly updated half-hour segments. The service is available not only for cable markets, but for broadcast by television and radio stations throughout the country.

The company's 1982 figures pointed to a bright future, with consolidated revenues of more than $165 million in 1982 representing an increase of 74 percent over 1981. The consolidated net loss of $3.35 million in 1982 represented a $10 million improvement over 1981. However, profits were reported in both the third and fourth quarters of the year—the first since the formation of CNN in 1979.

Superstations WTBS remained strong, increasing its subscriber base to 25.8 million, becoming the first cable service to reach 30 percent of all U.S. households. Cable News Network is available in 19.2 million cable households.

On the sports scene, the Atlanta Braves opened the season with 13 straight victories and went on to win the Western Division of the National League for the first time since 1969. Viewership of the Braves' games on WTBS increased 86 percent

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over 1981. 1982 also saw the NBA Atlanta Hawks in post-season play.

National advertisers increased significantly over the previous year, with a total of 273 major companies buying time on WTBS in 1982. By comparison, there were 199 national accounts in 1981, 168 in 1980 and 125 in 1979.

The success of CNN Healine News spurred the advent of CNN Radio. Launched in April, CNN Radio utilizes the audio portion of CNN Headline News and is currently heard in more than 60 markets.

During the year, the company entered into an agreement with the NCAA to broadcast 19 live college football games for each of the 1982 and 1983 seasons. The rights fees paid to the NCAA in 1982 relative to the broadcasts, $7.7 million, plus production costs were not totally offset by revenues. In addition to the NCAA games, the company also broadcast two National Football League Players' Association football games, resulting in increased expenses.

United Cable Television Corp.

4700 S. Syracuse Parkway
Denver, Colo. 80237
(303) 779-5999
Gene Schneider, chairman and CEO
Fred Vierra, president and COO
Richard Schneider, senior vice president

Cable interests:
- United Cable Television, 34 systems, 552,027 subs.
- Joint venture with the Tribune Cable Co.

Communication interests:
- Home Entertainment Network (80 percent).

The nation's 12th-largest MSO, United Cable branched out into STV in 1982 with the purchase of an 80 percent interest in the Home Entertainment Network. The purchase of HEN cost United Cable about $7.5 million, but provides the company with an STV audience of approximately 5 million homes in the Cincinnati/Dayton, Chicago and soon the Minneapolis/St. Paul markets.

An active franchiser, United Cable has recently gained rights to build systems in Scottsdale, Ariz., Alameda and Hacienda Heights, Calif., and Oakland County, Mich. The Oakland County franchise, with over 104,000 homes, was obtained through a 50-50 joint venture with Tribune Cable Communications Inc. The joint venture also won franchises in Montgomery County, Md., and Sacramento, Calif.

United Cable's 1982 revenues came within inches of acquiring a ninth digit, ending the year just short of the mark at $99,834,000, a comforting 58.9 percent jump over 1981's $62.8 million. Income nearly doubled, from $7.8 million in 1981 to $15 million in 1982, outdoing a record showing in 1981.

Viacom International Inc.

1211 Avenue of the Americas
New York, N.Y. 10036
(212) 575-5175
Ralph Baruch, chairman
Terrence Elkes, president

Cable interests:
- Viacom Cable Television Division, 630,255 subscribers (4/83). Ranked 11th in top 100 MSOs. Member of a partnership that operates the Bay Area Interconnect.
- Viacom Programming and Development. Develops, produces and acquires entertainment and informational programming for all media.
- Viacom Enterprises Division. World's largest independent

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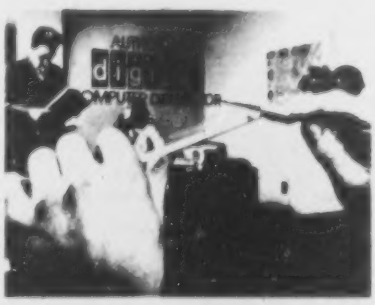

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Greenville, SC 29615

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distributor of television programming.
- Showtime. Purchased remaining 50 percent for $75 million (11/82). Approximately 4 million subs nationwide.
- Cable Health Network. Advertiser-supported channel devoted to health and fitness. Seven million subs on 700 systems.
- Joint venture to operate Showtime and The Movie Channel under a single operation, with MCA, Gulf+Western, Warner Amex.
- Joint venture to produce Japanese teletext, with Tokyo Broadcasting System, Mainichi Newspapers and Sports Nippon.
- Viacom World Wide. Formed in July 1982 to explore international marketplace possibilities.
- Dayton, Ohio, Interconnect. Joint venture with Continental Cablevision.

Communication interests:
- Eight radio stations.
- Two television stations (agreement signed to purchase a third, KSLA-TV, Shreveport, La.

The numerous communications concerns that make up Viacom International Inc. marked their 12th year in a row of record performance for the company. Total revenues for 1982 were $274.8 million, 30.6 percent higher than 1981's revenues of $210.4 million. Income did equally well, up 29.9 percent, from $18.9 million in 1981 to $24.5 million in 1982, while assets shot up 43.9 percent, from $443.6 million in 1981 to $663.8 million last year.

Viacom's Cable Television Division, ranked the 11th MSO in the nation with 630,255 subscribers, reported substantial increases in the number of subscribers, and gained a record $112.8 million in revenues, or 41 percent of the company total.

Viacom Cable announced that it is placing "high priority" on developing pay-per-view services over its cable systems, offering a number of events to subscribers in San Francisco, Nashville and Pittsburgh-Antioch, Calif., on a pay-per-view basis. Viacom also entered into a partnership to operate the 400,000-subscriber Bay Area Interconnect, one of the largest regional interconnected cable television networks in the country.

Viacom owns two major services, Showtime and its recently launched Cable Health Network. Viacom previously owned a 50 percent share in Showtime, but purchased the remaining 50 percent last year for about $75 million. Showtime's 4 million subscribers—a million subscriber gain over 1981—didn't remain exclusively in Viacom's hands long, however. Two months after it gained total control of Showtime, Viacom entered into a joint venture with MCA, Gulf+Western and Warner Amex to operate Showtime and The Movie Channel through a single operation, an agreement under which Viacom received $75 million and a 23 percent interest in the joint venture.

Viacom claims that its Cable Health Network, launched in July 1982, has set a new industry growth record, growing to 7 million subscribers on 700 systems by year's end. The 24-hour, advertiser-supported health and fitness channel averaged a million new subscribers a month during the fourth quarter of 1982, according to Viacom, and added 25 million new subscribers during the month of December alone.

Viacom also is involved in programming and development, with two separate divisions producing and acquiring programming not only for cable, but for network television and movies as well. Viacom has several ventures on the international scene: It is developing a Japanese teletext system in a joint venture with Tokyo Broadcasting, Mainichi Newspapers and Sports Nippon, and its newly formed Viacom World Wide is exploring cable opportunities overseas. Viacom also owns eight radio stations, two television stations and is negotiating to purchase a third TV station.

Walt Disney Productions

500 S. Buena Vista St.
Burbank, Calif. 91521
(213) 840-1769
E. Cardon Walker, chairman
Ronald Miller, president

Cable interests:
- The Disney Channel.

Communication interests:
- Walt Disney Motion Picture and Television Production Division.
- Walt Disney Outdoor Recreation Division.
- Walt Disney Telecommunications and Non-Theatrical Division.
- Walt Disney Marketing Division.
- Walt Disney Music Company.
- Wonderland Music Company.

Amid much ballyhoo and speculation, Disney launched its entry into cable television, The Disney Channel, in April 1983. After a short 50-50 partnership with Westinghouse's Group W Satellite Communications, Disney dissolved its partnership with Group W and assumed full control of The Disney Channel. The channel offers 16 hours a day of family-oriented programming, which will be a combination of old shows, movies and cartoons from the Disney archives, along with 17 original programs, produced by Disney at a cost of over $100 million.

Despite its leap into cable, Disney is working to expand its presence in network television. Disney is entering into its second year under a production agreement with CBS, providing series and movies-of-the-week to that network and is investigating similar agreements with both ABC and NBC.

Disney expanded the distribution of its home video products overseas in 1982, helping to make revenues from videocassettes, discs and 16 mm films a record $27 million. Disney also signed an agreement with RCA for the release of nine more titles in the CED format and introduced its own Disney label for LaserVision discs.

Other Disney projects inaugurated this year were the Epcot Center and Tokyo Disneyland. Epcot, a billion-dollar addition to Walt Disney World in Florida, is a futuristic amusement park that has drawn extensive publicity and good attendance since it opened its door in late 1982. Tokyo Disneyland is a fairly faithful reproduction of the California Disneyland, moved 3,000 miles east to an 114-acre site six miles from downtown Tokyo.

Disney also is involved in real estate, music, book and periodical publishing, record productions and merchandising throughout the world. Assets rose to $2.1 billion in 1982, up from 1981's $1.6 billion. Revenues were up only 3 percent, to $1.03 billion from a 1981 revenue of $1 billion. Income was down some 18 percent, however, to $100 million from last year's $121 million. The company attributed the decline to disappointing box office returns on several live-action Disney movies released this year, such as the expensive *Tron*, and the reduction of interest income due to expenditures for Epcot.

Warner Communications Inc.

75 Rockefeller Plaza
New York, N.Y. 10019
(212) 484-6990
Steven Ross, chairman
Emanuel Gerard, president
David Horowtiz, president

Cable interests:
- Warner Amex Cable Communications. Joint ownership with American Express Co. 147 systems in 27 states; total subs: 1.2 million.
- Warner Amex Satellite Entertainment Co. MTV; Nickelodeon; The Movie Channel. Agreement with MCA, Paramount, Viacom to combine operation of The Movie Channel with Showtime, keeping them as separate services.
- QUBE interactive systems operating in Columbus and

Cincinnati, Ohio, Pittsburgh, Houston, Dallas and portions of St. Louis and Chicago. QUBE III security systems available in most of these cities.
- Home Sports Entertainment channels. Regional networks featuring local professional and collegiate sports in Dallas, Houston and Pittsburgh.
- Agreement with Westinghouse to supply high-speed, all-digital cable link in Pittsburgh.

Cable operations of the giant Warner Communications have been owned jointly with the American Express Co. since 1979, when American Express bought a 50 percent share of Warner Cable for $175 million. The co-owned company consists of two divisions: Warner Amex Cable Communications, which owns and operates 147 systems serving over 1.2 million customers in 27 states; and Warner Amex Satellite Entertainment, which creates and acquires satellite programming.

Warner Amex is the fifth ranked MSO in the country, with 291,000 new basic subscribers added in 1982, bringing the total number of homes under franchise with Warner systems to over 3.8 million. Warner Amex reported that their 10,800 miles of new cable set down in 1982 led the industry. The company almost doubled its total net plant during 1982. Warner Amex is expanding the QUBE system to six additional cities, and is predicting that QUBE will start showing profits sometime in 1983. Through its QUBE III system, Warner Amex is adding such interactive services as home security, information retrieval and home shopping to its interactive systems. Warner reported a $46 million net loss on Warner Amex cable operations in 1982.

This year, Warner Amex announced the creation of its Home Sports Entertainment channels in Houston, Dallas and Pittsburgh. The channels will cover local professional and collegiate sports and will be available to subscribers of other cable systems as well as Warner Amex subscribers.

All three WASEC programming networks reported substantial growth in 1982. MTV's base quadrupled since 1981, to over 8.8 million subscribers, a growth rate that WASEC claims is unrivaled in the history of cable. The Movie Channel had 2.2 million subscribers at the end of 1982, a 30 percent increase over 1981. The management of The Movie Channel is about to change; in early 1983, WASEC announced that, along with American Express, MCA, Paramount and Viacom, The Movie Channel will be operated as a joint venture with Showtime. They will remain separate services, however.

WASEC's third channel, Nickelodeon, grew 60 percent in 1982, to 10.1 million households in 2,100 cable systems. The children-oriented channel seems to be in good condition to face off with the fledgling Disney Channel, which entered the youth-cable market in April 1983.

Despite total revenues of $307.6 million in 1982, cable operations are only a part of Warner Communications' melange of entertainment and communication companies that brought in nearly $4 billion in 1982. Warner's interests include consumer electronics, toys, recorded music and music publishing, films, publishing and related distribution, direct-response marketing and professional sports teams. Warner's holdings range from the Franklin Mint to Ralph Lauren fragrances, from *Mad Magazine* to a 48 percent share of the Pittsburgh Pirates.

Atari, the video game company that brought Pac-Man and Defender to the international scene, also is owned by Warner. Warner's only major divestiture in 1982 was the sale of the Knickerbocker Toy Co. to Hasbro. The sale resulted in a $35 million pre-tax loss for Warner, but the sale allowed Warner to acquire a 39 percent equity position in Hasbro, and Warner predicts that its involvement with toys will continue into the future.

Despite a sharp drop in fourth quarter earnings in 1982, Warner reported a net income of $257.8 million, a 14 percent improvement on 1981's $226.4 million. Revenues increased 23 percent, to $3.98 billion, up from $3.23 billion in 1981. Warner management is expressing concern over the outlook for short-term profits in 1983, but the company invested $227 million in net capital expenditures in 1982, and is predicting an improved long-term profit forecast.

Westinghouse Electric Co.

Gateway Center
Pittsburgh, Pa. 15222
(202) 833-5055
R.E. Kirby, chairman
Douglas Danforth, vice chairman

Cable interests:
- Group W Cable. 580 communities in 34 states; 1,876,991 subs (2/83).
- Group W Satellite Communications. Provides distribution for Nashville Network, Satellite News Channel.
- Satellite News Channel. 24-hour news service reaching 5.7 million subscribers in 557 affiliates. Joint venture with ABC Video Enterprises.
- Home Theater Network. 170,000 subs (4/83).

Communication interests:
- Group W Television: five VHF stations and one UHF station.
- Radio Group: six AM stations, five FM stations.
- Group W Productions.
- Muzak and Filmation Studios.
- TVSC. Videotape duplication production facility.

Westinghouse became an important factor on the cable scene quite suddenly, two years ago, when it purchased the number one MSO in the country, Teleprompter, for $646 million. Along with Teleprompter came 1.64 million subscribers, a 50 percent interest in the second largest satellite-delivered movie channel in the country, Showtime (sold this year for $75 million), plus the non-cable related Muzak and Filmation studios.

After changing Teleprompter's name to Group W Cable, Westinghouse set about energetically expanding their cable operations. It invested approximately $240 million to upgrade its 138 existing systems and add new franchises in 11 additional communities. Basic subscription increased 13 percent in 1982, and Group W ended the year with 1.8 million subscribers in 580 communities in 34 states.

Group W in turn created Group W Satellite Communications (GWSC), to serve as an umbrella division for its satellite services. GWSC launched the Satellite News Channel in June, an all-news, 24-hour service, in a joint venture with ABC Video Enterprises. SNC more than doubled its subscriber base during its first year of operations, reaching 5.4 million cable homes by the end of 1982.

GWSC also is providing marketing and distribution for the country-oriented Nashville Network, which began operation in early 1983 with an initial base of 6 million subscribers.

Besides communications, Westinghouse also manufactures a wide variety of industrial and consumer products. Though it has agreed to sell its light bulb and lighting fixtures divisions, Westinghouse still produces everything from robots to radar, including fighter aircraft systems, turbine generators, motors, circuit breakers, refrigeration equipment and bottling plants.

Total revenues were $9.7 billion in 1982, a 4 percent rise over last year's $9.3 billion. Income stood at $449.3 million, a 2.6 percent rise over 1981's $438 million. Cable revenues were meteoric by comparison, jumping 68.5 percent in 1982, to $726.2 million from 1981 revenues of $431 million.

Wometco Enterprises Inc.

316 N. Miami Ave.
Miami, Fla. 33128
(305) 579-1200
Elton Cary, chairman
Van Myers, president

Cable interests:
- Wometco Cable TV. Systems in Georgia, Mississippi, Louisiana, Alabama, New York, North Carolina, South

Carolina and Oklahoma; total subs: 229,000 (includes small system in the Bahamas).

Communication interests:
- Six television stations (four VHF).
- One radio station.
- Wometco Home Theater. Over-the-air subscription TV service (New York, New Jersey, Connecticut and Pennsylvania).

Wometco is the 22nd largest multiple system operator in the country, with 46 cable systems in 155 franchised communities scattered throughout eight states. Wometco's cable subsidiary, of which Wometco owns an 85 percent share, had a 41 percent rise in revenues in 1982, up to $46.4 million from a 1981 revenues of $32.9 million. Income more than doubled, from $4.67 million in 1981 to $9.49 million in 1982. Wometco increased its subscriber base by 17 percent this past year, with some 229,000 basic subscribers by year's end. The company added 20 new franchises in 1982, four requiring the building of two new cable systems, the other 16 added by extending existing systems.

Besides cable activities, Wometco owns six television stations, a radio station, 104 movie theaters, soft drink bottling plants, vending services, tourist attractions and an STV business called Wometco Home Theater, with 120,000 subscribers in the New Jersey/New York City and Philadelphia metropolitan areas.

In 1982, Wometco revenues rose 14 percent, to $493 million, from $434 million in 1981. Net income was $26 million, a 7 percent gain over 1981's income of $24.4 million.

Zenith Radio Corp.

1000 Milwaukee Ave.
Glenview, Ill. 60025
(312) 745-2000
Joseph Wright, chairman
Revone Kluckman, president and CEO

Cable interests:
- Videotex system technology exploration and development.
- Z-TAC addressable converter/decoder system; manufactured and distributed.

After suffering a precipitous 41 percent drop in net income last year, Zenith slipped out of the black and into the red in 1982, reporting a net loss of $21.8 million, as compared to 1981's $15.6 million profit. Citing "severe industry competitive pricing" and "low-price imports from the Far East" as factors contributing to the decline, Zenith net revenues slipped almost 3 percent, to $1.23 billion. Zenith's cable products division, however, showed continued fast growth, with revenues of $80 million, a 135 percent increase over last year's $34 million and eight times 1980's revenues of only $10 million.

Zenith's cable business centers on the company's Z-TAC addressable converter. Since its introduction in November 1981, 600,000 Z-TAC products have been shipped to systems in 25 states, and in 1982 Zenith began to expand its operations by building Z-TAC manufacturing facilities in Canada and Mexico. In addition, Zenith also is developing products for interactive services and teletext systems. In 1982, Zenith produced decoders for experimental teletext operations in San Diego, Calif., Orlando, Fla., and other cities. Zenith has developed the Virtext and Virdata teletext systems for receiving satellite transmissions of newswire reports.

Primarily known for its color televisions, Zenith manufactures a range of video and electronic equipment, including VCRs, picture tubes, switching transformers, decoders for STV and Heathkit electronic "do-it-yourself" kits. The company also produces microcomputers and software in its data systems division.

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Titsch Communications Inc.

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TELEX: 12041XAS NYK Cable Address: TELEXCOM Attn: RCINCO

Top 100 cable MSOs

Rank	Multiple system operator	Basic subs	Pay subs	Homes passed	As of date*
1	Tele-Communications Inc.[1]	2,255,000	NA	NA	12/82
2	American Television and Communications	2,198,200	1,981,175	4,288,275	3/83
3	Group W Cable	1,904,641	NA	NA	
4	Cox Cable Communications Inc.	1,348,281	1,352,128	2,334,623	3/83
5	Warner Amex Cable Communications Inc.	1,300,000	NA	NA	
6	Storer Cable Communications	1,228,977	1,300,594	2,318,859	3/83
7	Times Mirror Cable Television	815,946	575,222	1,600,471	3/83
8	Rogers UA Cablesystems	745,597	814,745	1,392,748	3/83
9	Newhouse Broadcasting[2]	719,920	662,476	1,231,744	3/83
10	Continental Cablevision	653,000	721,000	1,300,000	3/83
11	Viacom Cablevision	650,289	505,983	NA	
12	United Cable Television Corp.	559,774	473,687	1,011,472	3/83
13	Sammons Communications, Inc.	544,476	359,586	775,000	
14	TeleCable Corp.	355,032	331,350	629,086	3/83
15	Capital Cities Cable Inc.	314,283	209,884	455,000	11/82
16	General Electric Cablevision	313,800	181,400	508,000	
17	Cablevision Systems Development	302,000	826,000	691,000	3/83
18	Comcast Cable Communications	298,067	281,357	544,000	3/83
19	Heritage Communications Group	288,699	206,630	552,346	3/83
20	Liberty Communications	261,084	146,337	506,000	
21	Jones Intercable Inc.	246,067	152,881	402,770	
22	Wometco Communications	242,336	206,879	436,607	
23	Tele-Media	232,500	118,600	313,100	
24	TCA Group	223,064	62,371	306,605	
25	Daniels & Associates Inc.	217,000	198,392	451,600	
26	Multimedia Cablevision Inc.[3]	204,428	224,217	NA	
27	Maclean Hunter Cable TV Ltd.	201,504	266,163	413,851	3/83
28	Service Electric Cable TV Inc.	189,500	NA	NA	12/82
29	Century Communications Corp.	183,000	115,000	NA	12/82
30	Centel Cable Television	160,692	112,006	262,101	
31	Colony Communications Inc.	170,861	158,938	295,869	
32	Western Communications	154,407	60,337	192,500	
33	Prime Cable Corp.	146,579	120,307	265,763	3/83
34	Harris Cable Corp.	144,708	98,333	274,521	3/83
35	Rollins Cable Vue Inc.	140,700	101,300	140,700	
36	Cablentertainment Inc.	139,006	49,609	194,298	
37	Tribune Cable Communications	133,748	115,981	290,000	3/83
38	Cable America	123,740	196,121	389,110	
39	Sutton Capital Group[4]	120,514	132,604	217,365	3/83
40	Communications Service Inc.	120,371	NA	NA	3/83
41	Midwest Video Corp.	114,615	NA	NA	12/81
42	Harron Communications Corp.	109,734	61,940	166,223	2/83
43	Cable Vision Industries	106,451	97,783	157,229	2/83
44	Adams-Russell Telecommunications	104,124	104,783	193,271	
45	Midcontinent Cable Systems[5]	103,264	51,615	171,707	
46	McCaw Communications	101,900	54,980	162,000	3/83
47	Buckeye Cablevision	99,890	39,366	173,721	
48	American Cablesystems Inc.	98,000	97,300	156,600	3/83
49	Communications Systems Inc.	92,799	73,807	156,886	
50	Armstrong Utilities	89,191	59,901	130,000	
51	Multi-Channel TV Cable Co.	84,000	NA	NA	9/82
52	McDonald Group	82,447	50,113	137,623	
53	Southmedia Co.	82,246	76,312	159,287	2/83
54	Buford TV/Cable Division	76,653	33,996	120,223	7/82
55	King Videocable Co.	75,290	36,504	110,000	3/83
56	Summit Communications	75,225	47,415	130,452	
57	U.S. Cable Corp.	75,000	95,219	146,000	
58	Ultracom Inc.	75,000	61,000	185,000	
59	Falcon Communications	75,000	100,000	260,000	
60	Palmer Communications Inc.	73,813	21,927	87,180	
61	Perry Cable TV Corp.	73,506	33,970	119,496	
62	National Telecommunications Co.	71,450	27,725	89,650	
63	McClatchy Newspapers	71,015	47,680	159,195	3/83
64	The Essex Group	69,722	33,994	111,953	
65	WEHCO Video Inc.	68,547	39,172	120,000	3/83
66	American Cable Television Inc.	66,000	98,000	180,000	
67	Acton Corp.	65,000	58,000	208,000	3/83
68	Televents Inc.	64,757	NA	96,630	
69	Booth Communications	64,500	32,100	107,000	
70	Lenfest Group	60,451	48,769	116,138	
71	Total TV Inc.	60,035	50,377	123,355	
72	Omega Communications	60,000	NA	NA	12/82
73	Harte-Hanks Communications	58,000	58,000	108,000	3/83
74	Consolidated Cable Systems	57,505	52,395	106,000	
75	Pencor Services Inc.	56,853	19,679	61,075	12/82
76	Omni Cable TV Corp.	54,068	29,244	100,941	3/83
77	Wabash Cablevision	52,379	57,951	124,825	
78	Marsh Media	52,244	38,115		
79	The Daily Press	49,000	51,000	80,000	
80	Clear TV Cable Corp.	47,532	21,336	66,000	10/82
81	Selkirk Communications	45,540	41,900	110,000	
82	Sonic Cable TV	45,444	NA	51,000	3/83
83	Adelphia Communications	45,057	24,647	75,000	
84	Greater Media	44,343	25,249	61,575	
85	Susquehanna Broadcasting	43,600	NA	85,000	
86	National Cablesystems Inc.	39,713	20,108	NA	1/83
87	Donrey Cablevision	37,445	20,594	63,621	
88	Helicon Corporation	36,431	13,163	NA	3/83
89	Matrix Enterprises	35,892	NA	NA	
90	Combined Cable Corp.	35,000	30,100	62,140	
91	Joseph Gians	34,400	9,000	60,000	3/83
92	United Video Management	34,000	36,500	57,000	
93	Cable Holding Inc.	32,000	24,000	67,500	
94	United Broadcasting Co.	30,000	10,000	95,000	3/83
95	Cable Communications of Iowa	30,000	NA	NA	3/83
96	Wisconsin Cablevision & Radio Co.	28,620	31,282	46,847	3/83
97	Mickelson Media	27,953	20,220	43,136	
98	Mid America Media	27,768	9,115	33,400	
99	MultiVision Group	26,883	7,567	NA	
100	Jim R. Smith & Co.	25,174	6,807	30,814	3/83

* Figures are as of 4/83 unless noted otherwise
[1] Number is a company estimate
[2] Includes MetroVision, NewChannels, Vision Cable
[3] Includes Tar River Communications
[4] Includes owned and partially owned systems
[5] Includes systems owned and with controling interest

Source: ICR, Cable Information Service

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Top 100 cable systems

Rank	Location	Operator	Basic subs	Pay subs	Homes passed	As of date*
1	San Diego, Calif.	Cox Cable	221,585	147,635	361,500	12/82
2	Woodbury, N.Y.	Cablevision	189,000	537,000	419,000	3/83
3	Manhattan, N.Y.	ATC	174,475	106,825	376,800	3/83
4	Houston, Texas	Warner Amex	158,500	N/A	N/A	
5	San Antonio, Texas	Rogers UA	157,801	287,433	289,514	3/83
6	West Orange, N.J.	Maclean Hunter	148,644	173,804	298,616	3/83
7	Wayne, N.J.	Rogers UA	118,850	120,177	279,297	3/83
8	Tulsa, Okla.	United Cable	105,694	98,174	189,029	3/83
9	Audubon, N.J.	NYT Cable	104,141	109,577	214,192	
10	Erie County, N.Y.	Prime Cable	100,110	60,000	173,637	5/83
11	Austin, Texas	ATC	97,425	110,175	169,900	3/83
12	San Jose, Calif.	Gill Industries	96,000	33,100	N/A	
13	Cincinnati, Ohio	Warner Amex	95,000	N/A	N/A	
14	Tidewater, Va.	Cox Cable	91,393	119,815	172,021	12/82
15	Baltimore County, Md.	Cairtec Cablevision	89,095	117,729	187,194	
16	Orlando, Fla.[1]	ATC	86,700	72,600	184,000	3/83
17	Central Islip, N.Y.	Viacom	86,606	59,956	N/A	
18	Seattle, Wash.	Group W	85,907	N/A	N/A	
19	Memphis, Tenn.	ATC	85,025	127,450	212,275	3/83
20	Jefferson Parish, La.	Cox Cable	82,962	127,166	136,369	12/82
21	Toledo, Ohio	Buckeye Cablevision	81,009	32,318	140,000	
22	Manhattan, N.Y.	Group W	80,712	N/A	N/A	
23	Jacksonville, Fla.	ATC	78,875	100,600	187,250	3/83
24	Grand Rapids, Mich.	General Electric	76,400	45,300	143,300	
25	Honolulu, Hawaii	ATC	76,000	66,200	142,650	3/83
26	San Diego, Calif.	ATC	74,525	40,125	127,075	3/83
27	Wilmington, Del.	Rollins Cable	74,000	45,700	129,000	
28	Wichita, Kan.	Multimedia Cablevision	72,340	86,699	125,541	
29	San Francisco, Calif.	Viacom	70,684	47,962	N/A	
30	San Juan, Puerto Rico	Harris Cable Corp.	70,335	43,571	148,388	3/83
31	Richmond/Henrico County, Va.	Continental	68,730	78,900	157,900	
32	Pittsburgh, Pa.	Warner Amex	68,600	N/A	N/A	
33	Flint, Mich.	Comcast	64,900	35,200	123,000	3/83
34	Englewood, Colo.	United Cable	64,596	91,013	146,695	3/83
35	Baton Rouge, La.	Daniels & Associates	63,135	54,322	113,000	
36	Seattle, Wash.	Viacom	62,214	43,386	N/A	
37	Melbourne, Fla.[1]	ATC	61,900	28,500	84,000	3/83
38	Rochester, N.Y.	People's Cable	61,607	60,237	105,702	2/83
39	Columbus, Ohio	Warner Amex	61,000	N/A	N/A	
40	Buffalo, N.Y.	Cablescope	60,082	42,099	137,931	
41	Monterey, Calif.	Western	59,565	20,731	N/A	
42	Dallas, Texas	Warner Amex	58,000	N/A	N/A	
43	Santa Monica, Calif.	Group W Cable	57,868	N/A	N/A	
44	Jefferson County, Ky.[1]	Storer	56,228	95,591	85,350	3/83
45	South Bend, Ind.	Buford Television	56,200	24,000	119,000	12/82
46	Santa Barbara, Calif.	Cox Cable	56,167	24,587	72,500	12/82
47	Boston, Mass.	Warner Amex	55,840	N/A	N/A	
48	Snohomish County, Wash.	Viacom	55,610	28,971	N/A	
49	Kansas City, Mo.	ATC	55,300	90,550	154,900	3/83
50	Suburban Tacoma, Wash.	Cable TV of Puget Sound	55,140	34,276	101,607	
51	El Paso, Texas	Group W	55,097	N/A	N/A	
52	Allentown, Pa.	Twin County Cable	55,000	15,000	120,000	1/83
53	Akron, Ohio	Warner Amex	55,000	N/A	N/A	
54	Charlotte, N.C.	ATC	54,950	38,875	116,400	3/83
55	Harrisburg, Pa.	Sammons Commun.	54,541	26,054	83,000	
56	Columbus, Ohio	Coaxial Commun.	54,400	N/A	97,700	
57	Dade/Broward, Fla.[1]	Storer	54,366	70,459	113,262	3/83
58	Pompano Beach, Fla.	American Video Corp.	54,261	43,962	120,077	
59	Louisville, Ky.	Times Mirror	53,876	60,299	135,778	3/83
60	Bingham, N.Y.	NewChannels	53,461	27,022	69,699	
61	Phoenix, Ariz.	Times Mirror (50%)	53,157	88,600	153,809	3/83
62	Sarasota, Fla.[1]	Storer	52,716	32,682	74,026	3/83
63	Des Moines, Iowa	Heritage	51,954	49,316	113,000	3/83
64	Cleveland, Ohio	Viacom	51,876	58,526	N/A	
65	St. Petersburg, Fla.	Group W Cable	51,404	N/A	N/A	
66	Allentown, Pa.	Service Electric	51,000	15,100	124,910	12/82
67	Canton, Ohio	Warner Amex	50,400	N/A	N/A	
68	San Diego County, Calif.	Times Mirror	50,067	17,776	71,890	3/83
69	New Haven, Conn.[1]	Storer	49,692	35,392	81,752	3/83
70	Jackson, Miss.	ATC	49,125	35,100	84,025	3/83
71	Hartford, Conn.	Times Mirror	49,098	32,853	104,804	3/83
72	Indianapolis, Ind.	Wabash Cablevision	48,779	53,900	115,600	
73	Peoria, Ill.	General Electric	48,300	28,700	81,000	
74	Reading, Pa.	ATC	48,300	25,150	69,650	3/83
75	Charleston, S.C.[1]	Storer	48,246	55,886	99,247	3/83
76	Shreveport, La.	ATC	47,750	32,125	83,450	12/82
77	San Rafael, Calif.	Viacom	47,606	22,725	N/A	
78	Atlanta, Ga.	Cable America	47,471	79,727	143,048	
79	Port Arthur, Texas	Liberty	47,053	28,862	108,000	
80	Chattanooga, Tenn.	South Media	46,750	48,778	94,183	2/83
81	New Britain, Conn.	United Cable	46,203	24,525	70,353	3/83
82	Fayetteville, N.C.	ATC	46,100	29,300	72,800	3/83
83	Albany, N.Y.	ATC	45,075	29,075	87,200	3/83
84	Eugene, Ore.	Group W	45,052	N/A	N/A	
85	Omaha, Neb.	Cox Cable	44,275	80,592	N/A	12/82
86	Bridgeport, Conn.	Southern Conn. Cablevision	44,257	54,458	94,387	
87	Birmingham, Ala.	ATC	44,175	38,750	115,275	3/83
88	Moline, Ill.	Cox Cable	43,834	37,853	79,951	12/82
89	Oklahoma City, Okla.	Cox Cable	43,793	89,664	N/A	12/82
90	Scranton, Pa.	Vertu Cable TV	43,746	9,349	74,000	
91	DeKalb County, Ga.	Cable America	43,746	58,455	128,046	
92	Westchester County, N.Y.	Rogers UA	43,639	56,950	97,840	3/83
93	Bakersfield, Calif.	Warner Amex	43,400	N/A	N/A	
94	Lincoln, Neb.	MetroVision	43,315	21,741	75,000	3/83
95	Winston-Salem, N.C.	Summit Communications	43,262	25,737	67,963	
96	Spokane, Wash.	Cox Cable	43,257	38,528	96,000	12/82
97	Lansing, Mich.	Continental	43,200	30,000	79,000	3/83
98	Albuquerque, N.M.	Tribune Cable	43,000	48,000	120,000	
99	Brookhaven, N.Y.	Rogers UA	42,204	21,772	57,495	3/83
100	Rockford, Ill.	Rockford/Park Cablevision	42,107	21,204	78,511	

* Figures are as of 4/83 unless noted otherwise
[1] Figures are estimates
[2] Pay subs and homes passed are as of 12/82

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PROGRAMMING SERVICES

Basic programming services

Programming Service	Satellite/ transponder	Start-up date	Affiliates (as of 4/83)	Subscribers (as of 4/83)	Price per subscriber	Programming hours
AP Cable News	Satcom III/R/6 and VBI on Westar III/1	6/65	445	4,700,000	$6.00	24 hours
ACSN-The Learning Channel	Satcom III R/16	10/79	396	3,057,642	5¢	M-F 4/day 12½/wkend
ARTS (Hearst/ABC)	Satcom III R/1 Westar V/12X	4/81	1,625	9,500,000	free	7/day
Black Entertainment Television	Westar V/12X	1/79	180	3,700,000	1¢	6/day 7 days/wk
Cable Health Network	Satcom III R/17	6/82	1,028	10,282,777	free	24/day
Cable News Network	Satcom III R/14	6/80	3,287	19,159,000	20¢, 15¢ w/WTBS	24/day
CNN Headline News	Satcom III R/15	1/82	476	3,516,617	3¢ w/CNN	24/day
CBN Cable Network	Satcom III R/8	4/77	3,830	20,770,000	10¢,20¢	24/day
Cable Satellite Public Affairs Network	Satcom III R/19	3/79	1,000	13,000,000	3¢	24/day
Daytime (Hearst/ABC)	Satcom III R/22 Westar V/12X	1/82	671	9,200,000	free	4/day 8/day
Dow Jones Cable News	Satcom III R/6	4/81	110	1,115,000	1¢ or less	24/day
Entertainment and Sports Programming Network	Satcom III R/7	9/79	5,733	22,238,479	10¢/real sub	24/day
Electronic Program Guide	Satcom III R/3	1/82	75	1,109,464	$125/wk and $4/ channel/wk over 14 channels	24/day
Eternal Word Television Network	Satcom III R/18	8/81	72	1,124,000	free	4/day
Financial News Network	Satcom IV/2	11/81	758	7,704,527	free	M-F 7/day
Modern Satellite Network	Satcom III R/22	1/79	459	7,805,020		
Music Television	Satcom III R/11	8/81	1,500	12,000,000	free	24/day
The Nashville Network	Westar V/9D	3/83	725	7,500,000	na	24/day
National Christian Network	Satcom IV/7	6/80	92	1,421,647	free	12/day
National Jewish Television	Satcom III R/16	5/81	114	2,446,735	free	3/wk
Nickelodeon	Satcom III R/1	4/79	2,450	11,400,000	15¢	15/day
PTL Satellite Network	Satcom III R/2	4/78	725	7,500,000	free	24/day
Reuters Monitors Service	Satcom III R/18	1974	15	5,000	na	24/day
Reuters News View	Satcom III R/6	1969	375	3,500,000	na	24/day
Satellite News Channel	Westar V/4X,6X,9X 6D,8D	6/21/82	557	5,700,000	free	24/day
Satellite Program Network	Westar IV/11X	1/79	775	5,600,000	free	24/day
SIN National Spanish Television Network	Satcom IV/1	9/76	715	Total 25,713,800 Spanish 3,199,100	10¢ per Spanish Sub	24/day

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Trinity Broadcast Network	Satcom IV/17	5/78	245	2,874,000	free	24/day
UPI News Cable	Satcom III-R/6	1974	485	na	na	24/day
USA Network	Satcom III R/[illegible]	9/80	3,400	17,000,000	11¢	24/day
The Weather Channel	Satcom III R/21	5/[illegible]	840	8,300,000	free	24/day
WGN-TV (United Video)	Satcom IIIR/3	11/78	3,976	11,084,783	10¢	24/day
WOR-TV (Eastern Microwave)	Westar [illegible]/2D	4/79	796	4,703,757	10¢	24/day
WTBS	Satcom III R/6	12/76	5,214	25,823,000	10¢	24/day

Pay programming services

Programming Service	Satellite/ transponder	Start-up date	Affiliates (as of 4/83)	Subscribers (as of 4/83)	Price per subscriber	Programming hours
Bravo	Satcom IV/6	12/80	70	100,000	na	10/day
Cinemax	Satcom III-R/ 20 (east) 23 (west)	8/80	1,600	2,000,000	$3.50 approx.	24/day
The Disney Channel	Westar V/5X,6X	4/83	425	100,000	na	24/day
EROS	Satcom IV/5	5/82	22	200,000	$1.00 approx.	12/week
GalaVision	Westar IV/23 Satcom	10/79	160	125,000	na	M-F, 12/day 24 wkend
Home Box Office	Satcom III-R 13 (west) 24 (east)	9/75	4,500	11,500,000	$4.00 approx.	24/day
Home Theater Network Plus	Satcom III R/16	7/77	325	170,000	$2.95	12/day
The Movie Channel	Satcom III-R/5	1/80	2,350	2,350,000	$4.60 maximum	24/day
ON TV	Comstar/D4	4/77	3	452,995	na	24/day
Playboy Channel	Satcom IV/7	12/80	240	420,000	na	10/day
SelecTV	Westar V/11X	6/81	35	215,000	$6.75-$7.45	24/day
Showtime	Satcom III-R/ 10 (west) 12 (east)	7/76	2,400	4,000,000	na	24/day
Spotlight	Satcom III R/4	5/81	231	750,000	na	24/day

Basic audio services

Programming Service	Satellite/ transponder	Start-up date	Affiliates (as of 4/83)	Subscribers (as of 4/83)	Price per subscriber	Programming hours
KKGO-FM	Satcom IV/17	4/83	3	100,000	na	24/week
Lifestyle (United Video)	Satcom III-R/3	3/81	127	1,066,400	1¢ $40 minimum $100 maximum	24 hours
Moody Bible Institute (United Video)	Satcom III-R/3	5/82	23	316,723	free	24 hours
Satellite Radio Network	Satcom II-R/2	na	40	na	na	na
SCAN (SSS)	Satcom IV/3 Satcom III/6	11/82	8	100,000	2c	24/day
Sunshine Entertainment Network	Satcom III-R/2	na	3	21,000	na	24/day
WFMT Chicago (United Video)	Satcom III-R/3	8/79	168	912,997	2c	24/day

Source: ICR Cable Information Service

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Cable stats

Regional entertainment services

Programming Service	Satellite/ transponder	Start-up date	Affiliates (as of 4/83)	Subscribers (as of 4/83)	Price per subscriber	Programming hours
Atlanta Interfaith	Non-sat. fed	2/81	5	123,000	free	20/day
Atlantis Entertainment Network	Non-sat. fed	1/81	5	9,800	$10	40/week
Bay Area Religious Channel (BARC) c/o Catholic TV Network	Non-sat. fed	projected Sept. 83	34	200,000	free	25/week
Buffalo Sabres Hockey	Non-sat. fed	1974	9	325,000	na	October-May 8-12 hrs/wk
Festival Texas Cable Network	Non-sat. fed	3/83	1	110,000	free	4/day
Home Sports Entertainment (Dallas)	Non-sat. fed	4/83	na	na	na	6½/day
Home Sports Entertainment (Houston)	Satcom IV/11	1/83	na	na	na	6½/day
Home Sports Entertainment (Pittsburgh)	Non-sat. fed	4/83	na	na	na	6-8/day
Life Newsvision	Non-sat. fed	2/82	3	10,000	free	24 hours
Madison Square Garden	Non-sat. fed	1969	49	1,400,000	6c	7/day
Newsday Cable	Non-sat. fed	5/83	1	190,000	free	24 hours
Off Track Betting	Non-sat. fed	4/74	13	na	free	24
PRISM Philadelphia	Non-sat. fed	9/76	86	339,489	na	24
Sonics Superchannel	Non-sat. fed	2/81	10	23,500	50% of cable system subscribers	na-not regularly scheduled
SportsChannel-New England	Non-sat. fed	1/83	28	20,000	na	na-varies according to sport
SportsChannel-NewYork	Non-sat. fed	4/79	30	273,445	$4.25	23/wk
Sports Vision	Non-sat. fed	5/82	12	27,000	na	3-9/wk
Video Music Channel	Non-sat. fed	7/82	16	110,000	free	10/day
Z-Channel	Non-sat. fed	na	16	88,664	na	24/wk

Non-satellite-fed national services

Programming Service	Satellite/ transponder	Start-up date	Affiliates (as of 4/83)	Subscribers (as of 4/83)	Price per subscriber	Programming hours
Fuji Network	Bicycle tapes	1983	5	4,600	$13.47/mth.	5/day
PlayCable	Bicycle tapes	11/81	18	na	$5.50-$12	24
The Pleasure Channel	Bicycle tapes	5/82	18	15,000	$1-$1.50	6/day

Announced satellite-fed services

Aimi Group Network
1500 Broadway, 4th. Floor
New York, N.Y. 10036
(212) 307-7410
John Berentson
Launch: T.B.A.

The Aloha Network
(Lewmark Productions)
8730 W. 1st. St.
Los Angeles, Calif. 90048
(213) 275-4558
Mark Tobias
Launch: T.B.A.

American Christian Television Systems
c/o Baptist Radio TV Commission
6350 W. Freeway
Fort Worth, Texas 76150
(817) 737-4011
Michael Wright
Launch: 3/84

Apollo Entertainment Television
801 2nd Avenue
New York, N.Y. 10017
Percy Sutton
Debra Fields
Launch: 4th quarter '84

Bluemax
3 First National Plaza
14th. Floor
Chicago, Ill. 60602
(312) 781-9607
J. Holbrook
Launch: T.B.A.

The BuenaVision Channel
912 Northeastern
Los Angeles, Calif. 90063
(213) 267-1461
Ed Sterling
Launch: 3rd quarter '83

Cable Jazz Network
6606 W. Broad
Richmond, Va. 23230
(804) 282-9643
Russell Bateson
Launch: T.B.A.

The Channel Black
225 Central Park West
Suite 1123
New York, N.Y. 10024
(212) 874-2018
Fred Dawson
Launch: 3rd quarter '83

Source: ICR, Cable Information Service

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Cable stats

Christian Media Network
Relaunch: T.B.A.

Comedy Entertainment Network Telecommunication Station
716 Mount Curve Rd.
St. Paul, Minn. 55116
(612) 698-7404
Ivan Bonk
Launch: 9/20/83

The Community Channel
1156 Alum Creek Dr.
Columbus, Ohio 43209
(614) 221-0692
Bill Johnson
Launch: T.B.A.

Episcopal TV Network
P.O. Box 50022
Austin, Texas 78763
(512) 476-1791
Reverend Charles Summers
Relaunch: T.B.A.

Group W Cable Sports Network
41 Harbor Plaza
P.O. Box 10210
Stamford, Conn. 06904
Dan Ruth
Launch: T.B.A.

Kidvid Network
342 Madison Avenue
New York, N.Y. 10173
(212) 867-1700
Joanne Melton
Launch: 1/84

Magicable
1350 Avenue of the Americas
New York, N.Y. 10019
(212) 247-1700
David Smith
Launch: 3rd quarter '83

National Jazz Network
P.O. Box 157
Amherst, Mass. 01002
(413) 549-0811
Eric Reid
Launch: T.B.A.

The Nostalgia Network
(Lewmark Productions)
8730 W. 3rd Street
Los Angeles, Calif. 90048
(213) 275-4558
Mark Tobias
Launch: T.B.A.

PBS Cable
475 L'Enfant Plaza, S.W.
Washington, D.C. 20024
(202) 488-5000
Eric Sass
Launch: T.B.A.

Rock 24
(Lewmark Productions)
8730 W. 3rd.
Los Angeles, Calif. 90048
(213) 275-4558
Mark Tobias
Launch: T.B.A.

Satellite News Channel II
41 Harbor Plaza Drive
P.O. Box 10210
Stamford, Conn. 06904
(203) 964-8355
Dan Ruth
Launch: 4th quarter '84

The Silent Network
P.O. Box 1902
Beverly Hills, Calif. 90213
(213) 654-6972
Sheldon Artfeld
Launch: Early fall '83

Sitcom Channel
(Channelentertainment)
P.O. Box 1091
Knoxville, Tenn. 37901
(615) 524-2575
Rick Dodds
Launch: 1st quarter '85

Sunshine Cable
P.O. Box 3301
Cocoa, Fla. 32924
(305) 636-7114
Jim Thompson
Launch: 2nd quarter '83

Video Concert Hall
2215 Perimeter Park
Suite 6
Atlanta, Ga. 30341
(404) 452-7377
Jerry Crow
Launch: 3rd quarter '83

The Work Channel
(Lewmark Productions)
8730 W. 3rd St.
Los Angeles, Calif. 90048
(213) 275-4558
Mark Tobias
Launch: T.B.A.

Cable barometer

Television households (TVHH)	83,900,000
Homes passed by cable (HP)	51,019,700
Percent of TVHH passed by cable	60.8%
Basic cable subscribers	28,933,300
Percent of TVHH with basic cable	35.7%
Percent of HP with basic cable	56.7%
Pay cable subs	16,800,600
Percent of TVHH with pay cable	20.2%
Percent of HP with pay cable	32.9%
Percent of basic subs with pay cable	58.1%

Figures are as of May 31, 1983

Franchising calendar

This chart examines the franchise status of communities during the fourth quarter of 1982 and beginning of 1983. "Pending" refers to communities that are in the franchising process but have yet to make an award.

Arizona
Apache Junction—consultant chosen; expect RFP issuance 12/83 (8,000 homes).
South Tucson—awarded to Cox Cable 10/82.

California
Bellflower—awarded to Communicom Inc. 11/82.
Claremont—proposal deadline extended to 5/20/83 (9,000 homes).
Commerce—RFP issues; proposals due 7/29/83.
Davis—City Council approved award to Davis Cable Cooperative 12/82 (14,000 homes).
Dvarte—RFP issues; proposals due 7/25/83.
East San Fernando Valley—proposals received from Valley Cable and United Cable; award expected 7/83 (166,000 homes).
East Yolo—developing enabling ordinance; RFP expected by early summer 1983.
Hawaiian Gardens—award to CATV West 1/83 (3,500 homes).
Lomita—preliminary award to Colony Communications (8,137 homes).
Los Altos—expect RFP to be issued 6/83.
Los Angeles (South Central Region)—award expected 6/83 (180,000 homes).
Norco—RFP issued; proposals due 6/6/83.
Palo Alto—expect to issue RFP by 7/83 (22,000 homes).
Pico Rivera—California Cablevision contesting referendum denying them franchise.
Placentia—deadline for proposals extended to 5/31/83 (12,000 homes).
San Fernando—final agreement signed with Valley Cable 1/83.
South Monrovia—preliminary award to Falcon Communications; final award expected by 7/83 (5,450 homes).
South Placer County—Coastside Cable TV awarded non-exclusive franchise 1/83.
South Whittier—award to United Cable 1/83 (1,700 homes).
Sunnyvale—refranchising award to Sunnyvale Cable TV (TCI) expected by 6/83 (43,000 homes).
West Covina—award expected 5/83; proposals received from Falcon Cable and United Cable; (28,000 homes).

Colorado
Lafayette—award to Lafayette Communications (Scripps-Howard); ratified 2/22/83 (4,000 homes).
Platteville—awarded to Citation Cable Systems Ltd. (d/b/a Platteville Cablevision) 1/83.

Connecticut
Enfield, Hartland, East Grandy, Suffield, Windsor Locks, East Windsor, Somers, Stafford, and Union (cable area 11)—awarded to Continental Cablevision 12/82 (37,000 homes).
Windham, Lebanon, Scotland, et. al. (cable area 13)—hearings with 1) Natchaug Cablevision, 2) Telemedia Company of N.E. Connecticut, and 3) Eastern Connecticut Cable Television Inc.; decision expected by summer 1983.
Vernon Consortium (cable area 12)—awarded to United Cable 12/82 (22,551 homes).

District of Columbia
RFP to be released mid-summer 1983.

Florida
Tierre Verde—preliminary award to Centel; final award expected by 6/83 (2,000 homes).

Illinois
Addison, West Chicago, Winfield, Warrenville, Aurora (uninc. DuPage County Areas)—awarded to Centel Communications 11/82.
Bensenville—awarded to Continental Cablevision 11/82.
Broadview—awarded to Cablevision of Chicago 10/82 (3,300 homes).
Chicago—City Council awarded first negotiating rights for each area as follows: Area I to Cablevision Systems (300,000 homes); Area II to Group W (217,000 homes); Area III to Group W (193,000 homes); Area IV to Chicago Cable Communications (TCI/Cross Country joint venture) (226,000 homes); Area V to Continental Cablevision (188,000 homes); award expected summer 1983.
Countryside—preliminary award to Cablevision of Chicago (2,200 homes).
Downer's Grove, Darien—negotiating with Continental Cablevision; award expected 7/83 (6,830 homes).
Elmwood Park—RFP expected 7/83 (9,500 homes).
Glen Ellyn (unincs. DuPage County areas)—negotiating with Group W Cable. (3,100 homes).
Harwood Heights—negotiating with MetroVision and Cablevision of Chicago; award expected by 8/83.
Joy—award to Star Communications of Springfield 5/83 (220 homes).
LaGrange, LaGrange Park, Indian Head Park, Riverside—award to Centel 10/82 (15,000 homes).
Lisle—negotiating with Multimedia; award expected 7/83 (3,300 homes).
Lombard, Oakbrook Terrace, Elmhurst (unincs. DuPage County areas)—awarded to Continental Cablevision 10/82.
Naperville—final award to Centel expected 7/83 (17,500 homes).
Northbrook—award to Cablenet Inc. 10/15/82.
St. Charles, Geneva—negotiating with Centel; award expected 7/83 (10,000 homes).
South Holland—award to Multimedia 3/15/83 (7,400 homes).
Villa Park—negotiating with Multimedia; award expected 7/83 (7,100 homes).
Westmont (unincs. areas of DuPage County)—final award to Continental Cablevision 4/18/83 (10,000 homes).
Wheeler—RFP issued; proposals due 6/1/83.
Winnetka—decision to have cable has been postponed.
Woodbridge—negotiating with Cablevision of Chicago; award expected 7/83 (260 homes).

Indiana
DeMotte—proposals received from Northwestern Indiana Cablevision and Telecom Services (800 homes).
Indianapolis—City/County Council considering proposed ordinance which would allow franchises for SMATV companies.
Munster—awarded to U.S. Cable 12/82.

Iowa
Anthon—award to Midlands Cable Systems of Papillion, Neb. 12/82 (350 homes).
Camp ridge—award to Oak Cable Systems 3/83 (250 homes).
Cincinnati—award to Eagle Cable 12/82 (200 homes).
Colo—award to Oak Cable systems 2/22/82 (330 homes).
Kingsley—award to Satellite Communications 4/12/83 (400 homes).
Morning Sun—beginning franchise process (360 homes).
Preston—proposals received from Preston Area Cablevision and Tele-National Communications; award expected by 6/83 (430 homes).
Van Horne—award to Van Horne Cablevision 12/82 (280 homes).

Kentucky
Danville—received 5 bids: Communicable, Communications System, Constitution Cable, RV Cablevision and Brandenburg CATV Inc.; recommendation expected 6/83.
Greenville, Central City, Muhlenburg County—beginning negotiations with TCI (13,000 homes).
Hazel, Purveor—award to Galaxy Cablevision 12/8.
Wingo—award to Galaxy Cablevision 2/83 (300 homes).

Maine
Hartswell—final award to Video Vision expected 6/83 (2,800 homes).
Hermon—proposals received from Weer Communications, Maine Cable Co. and Coastal Cable; award expected by 6/83 (1,062 homes).

Maryland
Baltimore—award to Cattec Cablevision 2/23/83 (302,000 homes).
Bowie—award to Storer Cable 1/83 (11,000 homes).
Carroll County—RFP issued; deadline for proposals 6/1/83 (30,000 homes).
Chesertown—award to CATV General 2/83 (1,800 homes).
Montgomery County—award to Tribune-United 10/14/82 (200,000 homes).

Massachusetts
Abington—awarded to Campbell Communications 10/82.
Acton—award to Adams-Russell expected 6/83 (4,770 homes).
Ashland—award expected 6/83 (5,082 homes).
Ayer—awarded to Nashoba Communications inc. 11/82.
Belmont—exploring municipal ownership of cable.
Bourne—award to Campbell Communications 12/6/82.
Braintree—franchise awarded to Adams-Russell 4/83 (10,000 homes).
Bridgewater—award to Campbell Communications 1/24/83 (5,048 homes).
Cambridge—public referendum on municipal ownership 11/83 (43,000 homes).
Cohasset—award to American Cablesystems 3/16/83 (2,397 homes).
Dedham—preliminary award to Bay Cable TV.
East Bridgewater—preliminary award to Campbell Communications 4/83.
Hamilton and Wenham—proposals submitted by Continental Cablevision, Robins and Prestige Cable TV (2,300 homes).
Hanson—award to Continental Cablevision 3/22/82.

Source: ICR, Cable Information Service

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Michigan
Bloomfield Township, Bloomfield Hills—proposals received from Booth Communications, Bloomfield Communications and United Tribune; award expected 6/83 (15,000 homes).
Clarkston—final award to Multi-Cablevision 3/29/83 (1,200 homes).
Dearborn Heights—Final award to Continental Cablevision 4/12/83 (23,000 homes).
Detroit—award expected 6/31/83 (471,000 homes).
Livonia—preliminary award to Metrovision; final award expected by 6/83 (33,000 homes).
Marquette—final award to Marquette Cablevision 11/82 (7,000 homes).
Monroe—City Council awarded franchise to Communication and Cablevision Inc. to compete with existing franchised cable system, Monroe Cablevision.
Mt. Clemens—award to Comcast Cablevision 1/83 (6,000 homes).
Romeo—final award to Horton expected 6/83 (1,000 homes).
West Bloomfield, Keego Harbor, Orchard Lake, Sylva Lake—received 3 bids: Bloomfield Communications, Greater Media and Continental Communications; award expected 6/15/83.
West Oakland County Cable Group (Milford Village, Walled Lake, Wixom, Wolverine Lake Commerce, Highland, Lyon, White Lake)—proposals received from Com-Star, Greater Media and Associates of Bloomfield; award expected 7/83 (32,000 homes).

Minnesota
Afton, Cottage Grove, St. Paul Park, et al. (South Washington County Cable Commission)—award expected 6/83 (6,000 homes).
Arlington, Gaylord, Winthrop, Gibbon, Green Isle—negotiating with Communications Systems Inc. (2,568 homes).
Belle Plaine, Le Center, Le Sueur, Lonsdale, Montgomery, New Prague—expect RFP to be issued 8/83 (5,227 homes).
Blaine, Centerville, Circle Pines, Coon Rapids, Lexington, Ham Lake, Spring Lake Park (North Central Suburban Cable Communications Commission)—award expected 6/83.
Burnsville, Eagan—award expected 6/83 (12,849 homes).
Chanhassen—assessment not yet complete (2,285 homes).
Eagan—see Burnsville.
Forest Lake, Forest Lake Twp., Columbus Twp., Scandia Twp.—award expected 7/83 (5,619 homes).
Grand Marais—award expected 7/83.
Janesville—RFP issued (700 homes).
Maple Plain—beginning process (481 homes).
Minneapolis—final award 11/82 to Storer in north (100,000 homes) and Rogers in south (70,000 homes).
Minnetrista, Spring Park, Shorewood, Medina, St. Bonifacius, Excelsior, Deephaven, Woodland, Victoria, Tonka Bay, Orono, Minnetonka Beach, Greenwood, Long Lake (Lake Minnetonka Cable Communications Commission)—RFP issued; proposals due 7/12/83 (11,682 homes).
Mound—award to Dowden 3/22/83 (3,600 homes).
Northfield, Northfield Twp., Dundas, Bridgewater Twp., Rice County, Waterford Twp., Dakota County—award expected 8/83.
North St. Paul, Birchwood, Dellwood, Gem Lake, Grant Township, Lake Elmo, Landfall, Mahtomedi, Maplewood, Oakdale, Pine Springs, Vadnais Heights, White Bear Lake, White Bear Twp., Willernie—final award to Group W 5/13/83 (33,568 homes).
Owatonna—awarded to Tribune Cable 12/82 (7,000 homes).
Princeton, Rush City, Mora, Milaca, Cambridge, Braham, North Branch, Branch, Pine City, Isanti, Townships: Pine City, Chengwatana, Milaca, Bradford, Spencer Brook, Pokegama, Isanti, Arthur (East Central Cable Commission)—awarded to Combined Cable 12/82.
Prior Lake—award to Communication Systems Inc. 4/11/83 (2,560 homes).
Roseville, Arden Hills, Falcon Heights, Lauderdale, Little Canada, New Brighton, Mounds view, North Oak, St. Anthony, Shoreview (North Suburban Cable Commission)—award to Group W Cable 11/12/82 (44,000 homes).
St. James—award to Dowden 5/83 (1,820 homes).
St. Paul—award expected 6/83 (111,000 homes).
Savage—assessing needs for cable.
Stillwater, Bayport, Oak Park Heights (Central St. Croix Valley area)—only proposal from Telephone and Data Systems; award expected 5/83 (6,000 homes).
Waconia—beginning process (1,024 homes).
Watertown—beginning process (700 homes).
Wayzata—deadline for proposals extended 6/6/83 (1,800 homes).
West St. Paul, South St. Paul, Mendota Heights, Mendota, Inver Grove Heights, Lilydale, Sunfish Lake—RFP issued; deadline for proposals 6/15/83.
Windom—City Council will decide nature of cable franchise ownership by 5/83 (1,600 homes).

Missouri
Crocker—award to Comm Management 12/82 (450 homes).
Forsyth—award to Ozark Summit Cable 11/82.
Freeburg, Lebanon, Mascoutah and Shiloh Valley Townships—award to Metro East Cable 1/31/83.
Higbee—award to Comm Management 1/83 (330 homes).
Iberia—award to Comm Management 10/82 (325 homes).
Lancaster—award to Multi-Com 1/83 (460 homes).
St. Louis—re-issued RFP; proposals due 6/27/83 (178,000 homes).
Hingham—American Cablesystems is sole bidder; public meeting set for 6/83 (6,323 homes).
Holbrook—franchise awarded to Continental Cablevision 1/20/83 (3,100 homes).
Holliston—proposals received from Adams-Russell, CableVision Industries, United Video, Prestige Cable and Community Cablevision (3,922 homes).
Hopedale—proposals received from Greater Worcester Cablevision, Massachusetts Cablesystems and Rollins Cablevision; award expected 6/83 (1,200 homes).
Hull—award to American Cablesystems 1/10/83 (4,800 homes).
Lancaster—amended proposals due 5/14/83; award expected 6/83 (4,000 homes).
Lincoln—RFP issued; proposals due 8/1/83.
Mansfield—final award to Massachusetts Cablevision Systems 12/82.
Marblehead—restarting franchise process.
Marshfield—preliminary award to Greater Southshore Cablevision 11/82 (10,000 homes).
Medway—final award to Massachusetts Cablevision Systems 4/83 (3,000 homes).
Nahant—pending; Warner Amex sole bidder (1,433 homes).
Needham—final award to Continental Cablevision pending (8,700 homes).
Norfolk—RFP issued; proposals due 6/1/83 (1,800 homes).
Northborough—award to Greater Media 1/10/83 (3,334 homes).
Norwell—award to American Cablesystems 3/83 (2,760 homes).
Pembroke—provisional license to Campbell Communications 11/1/82 (4,264 homes).
Pepperell—award pending; proposals received from Adams-Russell, Nashoba Communications, Pepperell Cablevision and United Cablevision (2,800 homes).
Randolph—awarded to American Cablesystems 11/82 (9,800 homes).
Rockland—award to Campbell Communications 11/22/82 (5,005 homes).
Rowley—award to Newburyport Cable TV 4/83 (1,300 homes).
Seekonk—proposals received from Prestige Cablevision, Massachusetts Cablevision Systems, Rollins, Inland Bay Cable, Cable TV of East Providence, Seekonk Cablevision and Seekonk Cable TV (4,000 homes).
Sharon—award to Cablevision Industries 1/27/83.
Shrewsbury—final award to Shrewsbury Electric Light (8,500 homes).
Sterling—restarting franchise process in fall 1983.
Stoughton—award to Continental Cablevision 2/83.
Sudbury—award to Adams-Russell 3/23/83 (4,200 homes).
Townsend—pending (2,306 homes).
Walpole—pending (5,676 homes).
Waltham—award to Waltham Telecommunications (TCI) 5/17/83 (18,000 homes).
Wayland—RFP issued; proposals due 7/1/83 (3,500 homes).
Wellesley—award expected 6/1/83 (8,000 homes).
Westborough—award to Greater Media 1/18/83.
West Bridgewater—award expected fall 1983; proposals received from Campbell Communications and Continental Cablevision (2,000 homes) pending.
Westminster—RFP issued; proposals due 6/6/83 (1,000 homes).
Westport—award expected 7/83; proposals received from Westport Cable Television and United Cablevision Funding (5,500 homes).
Whitman—awarded to Continental Cablevision 10/82.
Wrentham—awarded to Massachusetts Cablevision Systems Inc. 12/7/82.

New Hampshire
Allenstown—final award to Horton Communications expected by 6/83 (1,500 homes).
Hampstead—final award to Rockingham Cablevision (1,500 homes).
Hudson—RFP issued 5/1/83; deadline for proposals 8/1/83.
Londonderry—RFP issued; no responses received (800 homes).
Windham—awarded to Horton Communications 5/83 (2,300 homes).
Wolfeboro—proposals received from Cablevision, Community TV, Maine Cable and Premium TV (803 homes).

New Jersey
Boonton Township—award to Sammons Communications 1/29/83 (3,600 homes).
Franklin Lakes—award to Rural Cable Service 10/82 (2,500 homes).
Jersey City—halt on issuance of RFP pending resolution of legal action.
Patterson—award expected by 10/83.
Upper Deerfield, Cumberland County—award to Group W Cable/Entertainment 10/28/82.

New York
Beekman—deadline for proposals extended until 8/31/83 (2,100 homes).
Cherry Valley—final award to Schoharie 4/83 (250 homes).
Honeoye—award to Honeoye Cable 4/5/83 (500 homes).
Mayville, Chautauqua, Westfield, Ripley—preliminary award to US Cable 3/22/82; final award expected 5/83 (5,430 homes).
New York City—preliminary agreement reached for outer boroughs, Warner Amex—Western Brooklyn, Northern Queens, Cablevision Systems—Eastern Brooklyn, Bronx, Cox Cable—Staten Island, Vision Cable—Northeastern Staten Island, ATC—areas of Queens, Queens Inner Unity Cable—Southern Queens.
North Salem—restarting franchise process (1,100 homes).
Pomfret—awarded to Harbor Vue Cable TV of Dunkirk (Adelphia) 2/83 (138 homes).
Union Vale—proposal deadline extended to 6/30/83.
Westfield—proposal received from U.S. Cable of Tri County.

North Carolina
Burke County—award to Cable TV Support Services 4/5/83 (10,000 homes).
Edgecombe County—final award to Tar River Cable Television 4/5/83 (4,000 homes).
Glen Alpine—negotiating with CATV Support Services; award expected by 6/83 (300 homes).
Hamett County—award to Univision Cable Systems 6/83.
Hiddenite—award to Catawba Valley Cable TV 2/83 (375 homes).
Jackson—expect to issue RFP 6/83. (400 homes).
Pamlico County—beginning franchise process (4,000 homes).

Ohio
Arcadia—award to Continental Cablevision 1/83 (300 homes).
Ashley—award to ACT Cable 1/83 (420 homes).
Batavia Township—proposals received from Cable Management, So-Comm, Highland Cable and Warner Amex; award expected 7/83 (4,000 homes).
Bloomville—award to Telerational Communications 10/82 (400 homes).
Brooklyn—municipal ownership under consideration (4,000 homes).
Cleveland—city still deliberating municipal versus private ownership.
Cuyahoga Heights—award to Space Cable of Ohio 12/82 (500 homes).
Forest—award to Telerational Communications 11/82 (650 homes).
Garfield Heights—proposals received from Continental, Comprexicable, Space Cable and Garfield Cable Communications (12,000 homes).
Hiram—awards to Univision Cable Systems 11/82 and Telerational Communications 1/83 (250 homes).
Holgate—award to Northern Ohio CATV Associates 10/82 (500 homes).
Londontown—pending.
Loudonville—award to Ashland County Cable Service 10/82 (1,200 homes).
Middleburg Heights—court validated award to Space Cable of Ohio 1/83 (7,000 homes).
Newburgh Heights—award to Space Cable of Ohio 1/83 (1,800 homes).
Quincy—restarting franchise process (250 homes).
Sheffield Village—award to Space Cable of Ohio 2/83 (1,000 homes).
South Charleston—award to Quality Cable Services of Grove City 12/82 (500 homes).

Oregon
Canby—only Canby Telephone Association made proposal; award expected by 4/83 (2,500 homes).
Cottage Grove—expect to issue RFP by 8/83 (2,500 homes).
Dunthrope—proposals received from Liberty Communications and Cable Systems; award expected 6/83 (500 homes).
East Multnomah County—final award to Rogers UA Cablesystems 4/7/83 (80,000 homes).
McMinnville—awarded to Liberty Communications 12/82.
Milwaukie—negotiating with Tribune Cable; award expected 6/83 (7,500 homes).
Sylvan, West Hills, Dunthrope—only proposal from Liberty Communications; award expected 6/83 (600 homes).

Pennsylvania
Philadelphia—eleven bids for four franchise areas submitted by eight companies: Wade Communications, Cablevision Systems, Colins Cablevision, Cox Cable, Independence Cablevision, Times Mirror Cablevision, Comcast Communications and Philadelphia Inner City Cablesystems; award expected 12/83.
West Manheim—award to Scatcom 10/83 (1,700 homes).

Rhode Island
Newport (Middletown, Portsmouth, Tiverton, Little Compton)—final award subject to resolution of pending lawsuit (29,500 homes).

Tennessee
Brentwood—award to Metro Cablevision 2/14/83.
Collierville—award to Gaylord Cablevision 1/83 (2,750 homes).
Mosheim—award to Mosheim Cablevision 2/83 (500 homes).
Whiteville—award to Tri-County Cable TV 11/82 (400 homes).

Texas
Azle—expect to issue RFP 6/83 (2,900 homes).
Joshua—franchise awarded to Alencom 4/83 (610 homes).
Plano—Advisory Board recommended TeleCable (25,000 homes).
Richardson—award to TeleCable 3/83 (23,082 homes).

Virginia
Clarendale County—Crafer General Communications submitted only proposal; award expected 7/83.
Fairfax City—Media General sole bidder; award expected 6/28/83 (6,500 homes).
Goochland County—award to Continental Cablevision 2/83.
Hanover County—award to Continental Cablevision 5/2c/83 (5,600 homes).
Loudon County—final award to Cable Communications 4/18/83 (11,500 homes).
Manassas—RFP expected to be issued by 6/83 (5,510 homes).
Manassas Park—final award to Manassas Park Cablevision expected 6/83 (1,931 homes).

Washington
Battle Ground—Cox submitted proposal; award expected 8/83 (1,000 homes).
Grange, Toppenish, Wapato, Zillah—final award to McCaw Communications expected 7/83 (5,000 homes).
Seattle, Central District—final award to Seattle Community Cablevision 2/83 (12,000 homes).
South Prairie—award to Cable TV Puget Sound 10/82.

Wisconsin
Alma Center—award to Western Wisconsin Communications Cooperative 12/82 (115 homes).
Hilbert—award to Cablevision of Fond du Lac 1/83 (375 homes).
Hixton—award to Western Wisconsin Communications Cooperative 2/83 (150 homes).
Hudson, North Hudson, River Falls—preliminary award to Telephone and Data Systems.
Hustisford—beginning franchise process (350 homes).
Johnson Creek—beginning franchise process (400 homes).
Kenosha—Total TV given first negotiation rights; award expected 6/83 (29,500 homes).
Merrillan—award to Western Wisconsin Communications Cooperative 12/82 (200 homes).
Milwaukee—final award to Warner Amex 5/5/83 (253,000 homes).
Seymour—award to Seymour Cablevision 11/82.
Spring Green, Spring Green Twp., Plain, Prairie du Chien—only proposal received from Kalo/Nics (1,750 homes).
Waterford—drafted work on ordinance 1/83 (400 homes).

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Top 30 markets franchise proposal summary

This chart compares franchise proposals in the top TV market core cities not yet wired for cable.

Applicant	Franchise area	% ownership	Home passed (000's)	Plant miles	Total channels	2-way/addressable	Cost of basic $ ch @ $	LO studio/mobile	Inst. net $ ch/plant mi.	# PPV channels	# Public access ch.	Construction cost (in millions)	Months to completion
1. NEW YORK—Preliminary agreement reached													
Cox Cable	Portions of Staten Island	Cox 100	58	400	70 min.	Yes	T.B.D.	T.B.D.	UNC/50 min.	T.B.D.	4	50	36
Vision Cable	NE Staten Island	Continental 50 Vision 50	190	904	112	Yes	T.B.D.	2/1	53/50 min.	2	4	56	30
American Television and Communications	portions of Queens	ATC 100	265	400	70 min.	T.B.D.	T.B.D.	T.B.D.	42/50 min.	T.B.D.	T.B.D.	T.B.D.	84
Queens Inner City Cable	Southern Queens	Minority Co. 60 local 40	188	950	104	Yes	T.B.D.	T.B.D.	54/246	T.B.D.	4	80	48
Warner Amex	Northern Queens	Warner Amex 100	300	930	86	Yes	T.B.D.	1/1	UNC/50 min.	6	4	100	60
Cablevision	Eastern Brooklyn	Cablevision 100	606	1,150	88	T.B.D.	T.B.D.	T.B.D.	44/50 min.	4	4	T.B.D.	84
Warner Amex	Western Brooklyn	Warner Amex 100	200	484	70 min.	Yes	T.B.D.	1/1	UNC/50 min.	6	4	100	60
Cablevision	Bronx	Cablevision 100	432	800	88	T.B.D.	T.B.D.	T.B.D.	44/50 min.	4	4	T.B.D.	72
2. LOS ANGELES—Contract finalized													
Al CESS	S. Central Area K	Sun Cable 80 local 20	182	685	70	Yes	T.B.D.	3/1	T.B.D./150	T.B.D.	T.B.D.	50	36
3. CHICAGO—Preliminary agreement reached													
Cablevision Systems	Loop, N. Shore	Cablevision 100	273	402	122	Yes	36@0.00	T.B.D.	116/T.B.D.	3	11	109	42
Group W Cable Chicago	N. Central	Group W 90 local 10	217.2	649	120	Yes	36@0.00	2/1	54/128	5	12	118.9	48
Group W Cable Chicago	N. West	Group W 90 local 10	193.1	691	120	Yes	36@0.00	2/2	54/125	5	12	107.9	48
Chicago Cable Communications	South	TCI 50 Cross Cross Country 50	221.7	831	122	Yes	36@0.00	1/2	36/200	3	4	75	60
Continental Cable Chicago	Far South	Continental 50 Stellar investors 50	194	862	120	Yes	36@0.00	5/1	34/138	4	5	70	36
4. PHILADELPHIA—Proposals under review													
Times Mirror	South	Times Mirror 100	155	445	109	Yes	37@10.90	2/2	46/445	No	15	26.5	48
Independence Cable	S. West	Minority 100	155	615	120	Yes	24@0.00	18/2	35/50	5	4	70	36
Philadelphia Inner City Cable	S. West	Minority 100	154	556	120	Yes	50@2.00	T.B.D.	50/T.B.D.	5	5	40.5	36
Wade Communications Inc.	S. West	J. Wade 10 WCI 50 local 40	175.8	636	120	Yes	58@5.95	4/2	35/50	3	13	45	36
Comcast Cablevision	N. West	Comcast 80 local 20	153.8	633	132	Yes	47@2.95	1/2	54/82	3	13	61.3	36
Cox Cable	N. West	Cox 100	154	840	112	Yes	61@5.95	5/3	54/55	4	12	100	36
Independence Cable	N. West	Minority 100	160	543	120	Yes	24@0.00	18/2	35/143	5	4	70	36

Source: ICR, Cable Information Service

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Applicant	Franchise area	% ownership	Home passed (000's)	Plant miles	Total channels	2-way/addressable	Cost of basic # ch = $	I/O studio/mobile	Inst. net # ch/plant mi.	# PPV channels	# Public access ch.	Construction cost (in millions)	Months to completion
Rollins Cablevision	N. West	Rollins 90 minority 10	155	749	240	Yes	26@1.95	1/1	61/124	1	15	60	23
Cablevision	N. East	Cablevision 100	155	718	123	Yes	61@2.00	2/2	54/159	5	5	50.5	30
Comcast Cablevision	N. East	Comcast 80 local 20	155.6	689	132	Yes	47@2.98	1/2	54/102	3	13	64.7	36
Rollins Cablevision	N. East	Rollins 90 minority 10	155.6	842	240	Yes	26@1.95	1/1	61/139	1	15	64.7	23
7. DETROIT—Proposals under review													
Barden Cablevison	citywide	Barden 57 local 23 minority 20	470	2,143	120	Yes	36 = 3.95	7/2	61/412	5	14	156	48
City Communications	citywide	local 74 minority 26	471	2,320	120	Yes	78 = 3.95	8/2	52/2320	3	4	157	48
Detroit Inner-Unity Bell	citywide	minority 80 local 20	470	2,323	112	Yes	31 = 12.95	9/9	25/465	3	5	134	60
14. SEATTLE—Contact finalized													
Seattle Community Cable	Central District	W.T. Johnson 80 local 20	13.4	110	54	Yes	23 = 9.00	1/1	NA/NA	NA	10	2.5	12
15. MINNEAPOLIS—Contract finalized													
Minneapolis Cable Systems	S. & East 6 of 13 wards	Rogers UA 100	80	417	120	Yes	12 = 0.00	N/A	54/200	7	NA	30	36
Northern Cablevision	N. & West 7 of 13 wards	Storer 100	93	433	120	Yes	12 0.00	N/A	54/200	7	NA	43	36
ST. PAUL—Proposals under review													
Continental Cablevision of St. Paul	citywide	Continental 50 Minneapolis public Radio 50	115	748	124	Yes	16 = 0.00	8/3	35/153	1	3	34	24
Group W	citywide	Group W 100	110	525	124	Yes	32 = 0.00	1/1	108/276	5	6	62	32
Nor-West Communications	citywide	local 100	115	791	88	Yes	36 = 0.00	1/1	94/841	3	10	39	32
18. TAMPA—Contract finalized													
Tampa Cable Co.	citywide	Tribune Cable 100	113	1,100	122	Yes	38 = 2.35	2/1	54/90	3	9	54	42
19. DENVER—Contract finalized													
Mile Hi Cable	citywide	ATC 42.5 Daniels 42.5 local 15	225	1,500	60	Yes	30 = 2.50	4/2	60/400	2	7	78	48
20. BALTIMORE—Preliminary agreement reached													
Calvert Telecommunications	citywide	Cablec 100	280	1,100	116	Yes	35 = 5.95	2/2	50/220	7	10	125	48
29. MILWAUKEE—Contract finalized													
Warner Amex	citywide	Warner Amex 100	300	1,166	108	Yes	12 = 0.00	6/3	UNC./20	7	4	95	48

T.B.D. designates to be determined
UNC. designates unlimited capacity
NA designates not applicable

Note: Washington (#8), Cleveland (#9) and St. Louis (#17) are beginning the franchise process. Sacramento (#21) extended an offer to Tribune-United but it was not accepted. Top 30 market cities not listed are already wired.

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